

PHAPlans

5YearPlanforFiscalYears2001 -2005
AnnualPlanforFiscalYear2001

**NOTE:THISPHAPLANSTEMPLATE(HUD50075)ISTOBE COMPLETEDIN
ACCORDANCEWITHINSTRUCTIONSLOCATEDINAPPLICABLEPIHNOTICES**

PHA Plan Agency Identification

PHAName: MuskegonHousingCommission

PHANumber: MI066

PHAFiscalYearBeginning:(10/2001)
PublicAccess to Information

Information regarding any activities outlined in this plan can be obtained by contacting:(select all that apply)

- X Main administrative office of the PHA
- ☐ PHA development management offices
- ☐ PHA local offices

Display Locations For PHA Plans and Supporting Documents

The PHA Plans (including attachments) are available for public inspection at: (select all that apply)

- X Main administrative office of the PHA
- ☐ PHA development management offices
- ☐ PHA local offices
- ☐ Main administrative office of the local government
- ☐ Main administrative office of the County government
- ☐ Main administrative office of the State government
- ☐ Public library
- ☐ PHA website
- ☐ Other (list below)

PHA Plan Supporting Documents are available for inspection at: (select all that apply)

- X Main business office of the PHA
- ☐ PHA development management offices
- ☐ Other (list below)

5-YEAR PLAN
PHAF ISCAL YEARS 2002-2006
[24CFRPart903.5]

A.Mission

State the PHA's mission for serving the needs of low -income, very low income, and extremely low -income families in the PHA's jurisdiction. (select one of the choices below)

X The mission of the PHA is the same as that of the Department of Housing and Urban Development: To promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination.

☐ The PHA's mission is: (state mission here)

B.Goals

The goals and objectives listed below are derived from HUD's strategic Goals and Objectives and those emphasized in recent legislation. PHA may select any of these goals and objectives as their own, or identify other goals and/or objectives. Whether selecting the HUD -suggested objectives or their own, **PHAS ARE STRONGLY EN COURAGED TO IDENTIFY QUANTIFIABLE MEASURES OF SUCCESS IN REACHING THEIR OBJECTIVES OVER THE COURSE OF THE 5 YEARS .** (Quantifiable measures would include target sets such as: numbers of families served or PHAS scores achieved.) PHA should identify these measures in the space to the right of or below the stated objectives.

HUD Strategic Goal: Increase the availability of decent, safe, and affordable housing.

X PHA Goal: Expand the supply of assisted housing
Objectives:

X Apply for additional rental vouchers:

X Reduce public housing vacancies:

☐ Leverage private or other public funds to create additional housing opportunities:

☐ Acquire or build units or developments

X Other (list below)

1.) Increase housing for disabled population through Section 8

2.) Increase homeownership opportunities in the community

X PHA Goal: Improve the quality of assisted housing
Objectives:

X Improve public housing management: (PHAS score)

X Improve voucher management: (SEMAP score)

X Increase customer satisfaction:

- X Concentrate one effort to improve specific management functions:
(list; e.g., public housing finance; voucher unit inspections)
- X Renovate or modernize public housing units:
Focus on Hartford Terrace
- X Demolish or dispose of obsolete public housing:
Turnkey III properties
- ☐ Provide replacement public housing:
- ☐ Provide replacement vouchers:
- X Other: (list below)
 1. Accelerated disposition of 5(h) and Turnkey III homes still in the Commission's inventory

- X PHA Goal: Increase assisted housing choices

Objectives:

 - ☐ Provide voucher mobility counseling:
 - X Conduct outreach effort to potential voucher landlords
 - ☐ Increase voucher payment standards
 - X Implement voucher homeownership program:
 - ☐ Implement public housing or other homeownership programs:
 - ☐ Implement public housing site -based waiting lists:
 - ☐ Convert public housing to vouchers:
 - ☐ Other: (list below)

HUD Strategic Goal: Improve community quality of life and economic vitality

- X PHA Goal: Provide an improved living environment

Objectives:

 - ☐ Implement measures to deconcentrate poverty by bringing higher income public housing households into lower income developments:
 - ☐ Implement measures to promote income mixing in public housing by assuring access for lower income families into higher income developments:
 - X Implement public housing security improvements:
 - X Designate developments or buildings for particular resident groups (elderly, persons with disabilities)
 - ☐ Other: (list below)

HUD Strategic Goal: Promote self -sufficiency and asset development of families and individuals

- X PHA Goal: Promote self -sufficiency and asset development of assisted households

Objectives:

- ☐ Increase the number and percentage of employed persons in assisted families:
- X Provide or attract supportive services to improve assistance recipients' employability:
Partner with Family Independence Agency
- ☐ Provide or attract supportive services to increase independence for the elderly or families with disabilities.
- ☐ Other: (list below)

HUD Strategic Goal: Ensure Equal Opportunity in Housing for all Americans

- X PHA Goal: Ensure equal opportunity and affirmatively further fair housing
Objectives:
 - X Undertake affirmative measures to ensure access to assisted housing regardless of race, color, religion, national origin, sex, familial status, and disability:
 - X Undertake affirmative measures to provide a suitable living environment for families living in assisted housing, regardless of race, color, religion, national origin, sex, familial status, and disability:
 - ☐ Undertake affirmative measures to ensure accessible housing to persons with all varieties of disabilities regardless of unit size required:
Other: (list below)

Other PHA Goals and Objectives: (list below)

Goal One: Manage the Commission's existing public housing program in an efficient and effective manner thereby qualifying as at least a standard performer.

Objectives:

1. HUD shall recognize the Commission as a standard performer by September 30, 2002.
2. Recruit and retain Key Outside Contractors
3. Provide Training for Commissioners and Management Staff
4. Recruit Skilled and Experienced Housing Commissioners
5. Develop and Implement Public/Community Relations Plan to improve the public "perception" of Hartford Terrace by September 30, 2002.
6. Develop and/or Implement Management, Maintenance, Personnel and Financial Policies and Procedures
7. Modify the Capital Plan to address additionally needed Deferred Maintenance and Building Systems Replacements at Hartford Terrace
8. Balance Public Housing Operating Budget, and Implement Internal Financial Controls
9. Maintain the financial integrity of each HUD -funded program.

10. Implement a Public Housing Management Information System to Improve Overall Management and Financial Reporting

Goal Two: Provide a safe and secure environment in the Muskegon Housing Commission's public housing developments, particularly Hartford Terrace.

Objectives:

1. The Muskegon Housing Commission shall reduce crime in Hartford Terrace so that the crime rate is less than the surrounding neighborhood by September 30, 2002. Management will restore the safety and security of the property through the implementation of a property management/security presence.
2. The Commission shall pursue a memorandum of understanding with the City's police force to be involved in "Community Policing" activities at Hartford Terrace.

Goal Three: Dispose of all Homeownership 5(h) and Turnkey III Properties

Objectives:

1. Expedite pending application with HUD to demolish empty condemned Turnkey III dwellings.
2. Seek demolition funds from HUD to demolish the Turnkey III Properties.

Goal Four: Seek an Elderly/Assisted Housing Designation for Hartford Terrace

Objectives:

1. Improve Security, Implement additional Deferred Maintenance, and Community and Supportive Services through the development of local partnerships.
2. Develop a plan to develop two or more Hartford Terrace dwellings units for delivery of community and supportive services and for storage of modernization contract items and as a "construction shack" for modernization contractor.
3. Explore marketing Hartford Terrace as a Senior Building with Supportive, and possibly, Assisted Living Services.
4. Identify models and determine the feasibility of making Hartford Terrace an Assisted Living facility.

Goal Five: Improve Section 8 Housing Voucher Program

Objectives:

1. Explore the availability of additional vouchers to address the waiting list needs.
2. Identify and create partnership opportunities with landlords to increase availability of housing units to serve "families" and those with "special needs".

Goal Six: Improve Management of Scattered Sites

Objectives:

1. Implement deferred maintenance at the three (3) duplexes.
2. Sell the remaining "Homeownership" units at a reasonable price to existing residents, persons on the waiting list, and/or on the open market. Examine the feasibility of writing down the cost of the homes; "soft" second mortgages; and, Section 8 housing voucher to make these units affordable.
3. Immediately dispose and/or demolish boarded-up units.

Goal Seven: Implement Family Self-Sufficiency, Community and Supportive Services

Objectives:

1. Reinstate the Family Self-Sufficiency Coordinator's position if HUD still funds the position
2. Determine what happens to escrow accounts, and reinstate.
3. Conduct Resident Needs Assessment
4. Establish Community Partnerships and Task Force to monitor implementation of a community and supportive Plan.
5. Further develop a Partnership with the Community Mental Health (CMH), and form cooperative arrangements with other related service providers.

AnnualPHAPlan
PHAFiscalYear2002
[24CFRPart903.7]

i. AnnualPlanType:

SelectwhichtypeofAnnualPlanthePHAwillsubmit.

☐ **StandardPlan**

StreamlinedPlan:

- ☐ **HighPerformingPHA**
☐ **SmallAgency(<250PublicHousingUnits)**
☐ **AdministeringSection8Only**

X TroubledAgencyPlan

ii. ExecutiveSummaryoftheAnnualPHAPlan

[24CFRPart903.79(r)]

ProvideabriefoverviewoftheinformationintheAnnualPlan,includinghighlightsofmajorinitiativesanddiscretionarypolicies,thePHAhasincludedintheAnnualPlan.

TheMuskegonHousingCommission(Commission)haspreparedthisAgencyplanincompliancewithSection511oftheQualityHousingandWorkResponsibilityActof1998,theensuingHUDrequirements,andinlightofits“Troubled”HousingAuthoritystatus.

FollowingareourrecommendedgoalsfortheMuskegonHousingCommissionforthenextfive(5)years.First,andforemost,thecommissionneedstogetoffofHUD’stroubledlist;stabilizeitsfinancialcondition;and,improvetheperceptionofthehousingauthoritywithinthelocalcommunity.Inthisregard,followingarerecommended“goalsandobjectives”forthenextfiveyears.

GoalOne: Manage the Commission’s existing public housing program in an efficient and effective manner thereby qualifying as at least a standard performer.

Objectives:

1. HUD shall recognize the Commission as a standard performer by September 30, 2002.
2. Recruit and retain Key Outside Contractors
3. Provide Training for Commissioners and Management Staff
4. Recruit Skilled and Experienced Housing Commissioners
5. Develop and Implement Public/Community Relations Plan to improve the “perception” of Hartford Terrace by September 30, 2002.
6. Develop and/or Implement Management, Maintenance, Operational, Personnel and Financial Policies and Procedures

7. Modify the Capital Plant to address additionally needed Deferred Maintenance and Building Systems Replacements and repair at Hartford Terrace
8. Balance Public Housing Operating Budget, and Implement Internal Financial Controls
9. Maintain the financial integrity of each HUD -funded program.
10. Implement a Public Housing Management Information System to improve overall management and Financial Reporting.

Goal Two: Provide a safe and secure environment in the Muskegon Housing Commission's public housing developments, particularly Hartford Terrace.

Objectives:

1. The Muskegon Housing Commission shall reduce crime in Hartford Terrace so that the crime rate is less than the surrounding neighborhood by September 30, 2001 through the implementation of a 24-hour property management/security presence, management will restore the safety and security of the property.
2. The Commission shall pursue a memorandum of understanding with the City's police force to be involved in "Community Policing" activities at Hartford Terrace.

Goal Three: Dispose of all Homeownership 5(h) and Turnkey III Properties

Objectives:

1. Pursued discussion with the City Manager regarding a satisfactory agreement between the City and the Commission to dispose of the Turnkey III Properties.
2. Seek demolition funds from HUD to demolish the Turnkey III Properties.

Goal Four: Seek an Elderly/Assisted Housing Designation for Hartford Terrace

Objectives:

1. Improve Security, Implement additional Deferred Maintenance and Community and Supportive Services through the development of local partnerships.
2. Develop a plan to develop two more Hartford Terracedwelling units for delivery of community and support services and for storage of modernization contract items and as a "construction shack" for modernization contractor.
3. Explore marketing Hartford Terrace as a Senior Building with Supportive, and possibly, Assisted Living Services.
4. Identify models and determine the feasibility of making Hartford Terrace an Assisted Living facility.

Goal Five: Improve Section 8 Housing Voucher Program

Objectives:

1. Explore the availability of additional vouchers to address the waiting list needs.
2. Identify and create partnership opportunities with landlords to increase availability of housing units to serve “families” and those with “special needs”.

Goal Six: Improve Management of Scattered Sites

Objectives:

1. Implement deferred maintenance at the three (3) duplexes.
2. Sell the remaining “Homeownership” units at a reasonable price to existing residents, persons on the waiting list, and/or on the open market. Examine the feasibility of writing down the cost of the homes; “soft” second mortgages; and, Section 8 housing vouchers to make these units affordable.
3. Immediately dispose and/or demolish boarded-up units.

Goal Seven: Implement Family Self-Sufficiency, Community and Supportive Services

Objectives:

4. Reinstall the Family Self-Sufficiency Coordinator’s position if HUD still funds the position
2. Determine what happens to escrow accounts, and reinstate.
3. Conduct Resident Needs Assessment
4. Establish Community Partnerships and Task Force to monitor implementation of a community and supportive services Plan.
5. Further develop a Partnership with the Community Mental Health (CMH), and form cooperative arrangements with other related service providers.

iii. Annual Plan Table of Contents

[24CFR Part 903.79(r)]

Provide a table of contents for the Annual Plan, including attachments, and a list of supporting documents available for public inspection.

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Attachments

Indicate which attachments are provided by selecting all that apply. Provide the attachment's name (A, B, etc.) in the space to the left of the name of the attachment. Note: If the attachment is provided as a **SEPARATE** file submission from the PHA Plans file, provide the filename in parentheses in the space to the right of the title.

Required Attachments:

- X Admissions Policy for Deconcentration
- X FY2001 Capital Fund Program Annual Statement
- X Most recent board -approved operating budget (Required Attachment for PHAs that are troubled or at risk of being designated troubled ONLY)
- X Membership of the Resident Advisory Board

Optional Attachments:

- ☐ PHA Management Organizational Chart

- X FY2001 Capital Fund Program 5 Year Action Plan (MI066A01)
- ☐ Public Housing Drug Elimination Program (PHDEP) Plan
Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text) (MI066A01)
- ☐ Other (List below, providing each attachment name)

Supporting Documents Available for Review

Indicate which documents are available for public review by placing a mark in the "Applicable & On Display" column in the appropriate rows. All listed documents must be on display if applicable to the program activities conducted by the PHA.

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
	PHA Plan Certification of Compliance with the PHA Plans and Related Regulations	5 Year and Annual Plans
X	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans
X	Fair Housing Documentation: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdiction to implement any of the jurisdictions' initiatives to affirmatively further fair housing that require the PHA's involvement.	5 Year and Annual Plans
X	Consolidated Plan for the jurisdiction/s in which the PHA is located (which includes the Analysis of Impediments to Fair Housing Choice (AI)) and any additional backup data to support statement of housing needs in the jurisdiction	Annual Plan: Housing Needs
X	Most recent board -approved operating budget for the public housing program	Annual Plan: Financial Resources;
X	Public Housing Admissions and (Continued) Occupancy Policy (A&O), which includes the Tenant Selection and Assignment Plan [TSAP]	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public Housing Deconcentration and Income Mixing Documentation: 1. PHA board certification of compliance with deconcentration requirements (section 16(a) of the US Housing Act of 1937, as implemented in the 2/18/99 <i>Quality Housing and Work Responsibility Act Initial Guidance</i> ; <i>Notice</i> and any further HUD guidance) and 2. Documentation of the required deconcentration and income mixing analysis	Annual Plan: Eligibility, Selection, and Admissions Policies

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
X	Public housing rent determination policies, including the methodology for setting public housing flat rents X check here if included in the public housing A&O Policy	Annual Plan: Rent Determination
X	Schedule of flat rent offered each public housing development X check here if included in the public housing A&O Policy	Annual Plan: Rent Determination
X	Section 8 rent determination (payment standard) policies X check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
X	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation)	Annual Plan: Operations and Maintenance
X	Public housing grievance procedures check here if included in the public housing A&O Policy	Annual Plan: Grievance Procedures
X	Section 8 informal review and hearing procedures X check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
X	The HUD -approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs
X	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
X	Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option)	Annual Plan: Capital Needs
	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans or any other approved proposal for development of public housing	Annual Plan: Capital Needs
X	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act	Annual Plan: Conversion of Public Housing
X	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
X	Policies governing any Section 8 Homeownership program X check here if included in the Section 8 Administrative Plan	Annual Plan: Homeownership
X	Any cooperative agreement between the PHA and the TANF agency	Annual Plan: Community Service & Self-Sufficiency
X	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
		Service & Self - Sufficiency
	Most recent self - sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports	Annual Plan: Community Service & Self - Sufficiency
	The most recent Public Housing Drug Elimination Program (PHDEP) semi - annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan)	Annual Plan: Safety and Crime Prevention
X	The most recent fiscal year audit of the PHA conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h)), the result of that audit and the PHA's response to any findings	Annual Plan: Annual Audit
X	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
	Other supporting documents (optional) (list individually; use as many lines as necessary)	(specify as needed)

1. Statement of Housing Needs

[24CFR Part 903.79(a)]

A. Housing Needs of Families in the Jurisdiction/s Served by the PHA

Based upon the information contained in the Consolidated Plan/s applicable to the jurisdiction, and/or other data available to the PHA, provide a statement of the housing needs in the jurisdiction by completing the following table. In the "Overall" Needs column, provide the estimated number of renter families that have housing needs. For the remaining characteristics, rate the impact of that factor on the housing needs for each family type, from 1 to 5, with 1 being "no impact" and 5 being "severe impact." Use N/A to indicate that no information is available upon which the PHA can make this assessment.

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Afford- ability	Supply	Quality	Access- ibility	Size	Loca- tion
Income ≤ 30% of AMI		4	4	4	2	2	2
Income > 30% but ≤ 50% of AMI		3	3	3	2	2	2
Income > 50% but < 80% of AMI		2	2	2	2	2	2
Elderly		3	3	2	1	1	1
Families with Disabilities		4	4	4	4	4	4
Race/Black		1	1	1	1	1	1
Race/White		1	1	1	1	1	1
Race/Hispanic		1	1	1	1	1	1

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Afford- ability	Supply	Quality	Access- ibility	Size	Loca- tion
Race/Asian		1	1	1	1	1	1

What sources of information did the PHA use to conduct this analysis? (Check all that apply; all materials must be made available for public inspection.)

- X Consolidated Plan of the Jurisdiction/s
Indicate year: 2000
- ☐ U.S. Census data: the Comprehensive Housing Affordability Strategy (“CHAS”) dataset
- ☐ American Housing Survey data
Indicate year:
- X Other housing market study: Neighborhood Investment Cooperation
Indicate year: 2000
- X Other sources: (list and indicate year of information)
- o Interviews – 2000
 - o City of Muskegon Survey of Vacancies – 2000

Housing Needs Assessment

The following housing needs assessment is based on a combination of interviews conducted in 2000, a review of The Consolidated Plan 2000–2004 for the City of Muskegon (April, 2000); analysis of the Muskegon Housing Commission waiting list for Section 8 as of September, 2000; a survey of vacancies at affordable apartment complexes conducted by the City of Muskegon Department of Neighborhood and Community Services (September, 2000); and review of a housing market study conducted in 2000 by a housing consultant for Neighborhood Investment Corporation (NIC), a Muskegon non-profit housing developer. Because the Consolidated Plan relies heavily on Census data that is ten years old, the NIC study of Muskegon’s housing market, which used demographic forecasts by a national forecasting firm, was considered in assessing trends in the marketplace.

Population

The service area for the Muskegon Housing Commission is the City of Muskegon. The Consolidated Plan estimates the 1998 city population at 39,017, down slightly from 1990. The NIC housing market study estimates the City’s 2000 population at 41,631, with growth projected to increase the city’s population by 3% over the next decade. The City of Muskegon accounts for approximately 25% of Muskegon County’s population.

Employment

Following a period of double-digit unemployment in the City during the early 1990's, State of Michigan employment data indicates that 2000 unemployment was down significantly to approximately 6%. However, the minority unemployment rate is estimated at 15%. While increasing numbers of city residents are employed outside of the city, Muskegon continues to have a significant number of jobs in the manufacturing, retail and services (health care and education) sectors.

Household Income

An estimated 39% of City of Muskegon households had a household income under \$15,000 in 2000, in comparison to the 41% reported in the 1990 Census. Based on 1999 HUD income limits for 1-4 person households, this would constitute extremely low income. An additional 20% of City households had incomes between \$15,000 - 24,999, (compared to 22% in 1990) placing them in the very-low income range. Given the cost of living increases and the City's overall low unemployment, the fact that these percentages have declined so slightly over the decade indicates an entrenched concentration of poverty in the City.

Table 1
City of Muskegon Household Income

	1990	2000	2005
Less than \$14,999	6,023	5,663	5,574
\$15,000- \$24,999	3,195	2,925	2,857
\$25,000- \$34,999	2,355	2,313	2,303
\$35,000- \$49,999	1,983	1,890	1,867
\$50,000- \$74,999	929	1,263	1,346
\$75,000 - \$99,999	131	203	221
\$100,000+	69	81	85
Total Households	14,685	14,338	14,253

Source: 1990 Census of Population; Claritas, Inc., Gove Associates.

Housing Occupancy

The City's proportion of owner-occupied housing was 55% in 1990. The number of owner-occupied units increased by an estimated 890 units over the decade. The estimated 2000 homeownership rate remains about 55%.

Forty -five percent of Muskegon's households are renters. Current gross median rent is estimated at \$450 per month. Over the past decade, an estimated 742 rental units were added to Muskegon's rental inventory.

Housing Needs –Extremely and Very Low Income Households

According to the City's Consolidated Plan, based on 1990 census data, 579 (9.9%) of the City's occupied households were overcrowded. These households tend to be located in neighborhoods with high concentrations of large -family households.

Just over 17% (2,581) of the City's households are single -parent households, with 90% having female heads of household. Seventy -four percent of female -headed households have incomes below the poverty level.

Thirty percent (5,448) of the city's households are headed by persons age 62 and older in 1990. Many elderly residents are homeowners who lack the resources to relocate from inner city neighborhoods. These households have a dire need for home maintenance grants and programs to assist with home repair. There are large numbers of both low -income elderly and single -parent households concentrated in the City's Enterprise Community area.

According to the City's Comprehensive Plan, 3,419 or 51.4% of the city's renter households had incomes at or below 50% of the area median income in 1990. An analysis of the housing stock indicated that only 3,122 rental housing units are affordable to very -low-income families, producing an affordability gap in 1990 of almost 300 units. Over the past decade, non -profit organizations have produced several rental developments for seniors and families using the low income housing tax credit program, HOME and/or the Section 202 program. It should be noted that in the Muskegon market, tax credit rents are very close to market rents. As a result, very low-income households who do not have access to Section 8 certificates would not necessarily find this housing affordable.

The Muskegon Housing Commission's rental stock consists of a building with 160 one-bedroom units at Hartford Terrace and six family apartment units located in duplex units.

Section 8 certificates have been the primary means used by the Housing Commission to address Muskegon's housing affordability gap for extremely -low and very -low-income households. Housing Commission waiting list statistics indicate that between January, 1999 and September, 2000, 621 households applied to the Housing Commission for Section 8 rental assistance, 279 households received assistance during this period and 73 were placed on the Section 8 waiting list. The remaining households who applied for assistance are no longer on the waiting list for reasons that include over income, incomplete application, failure to attend orientation, or background problems.

Nearly 65% (119) of households on the waiting list are single parents with minor children. Families with a disabled head of household comprise 10% (18) and single disabled person households comprise 18% (34). Seventy-six percent (140) of the households on the waiting list are extremely low-income and the remainder are very low-income. Approximately eighty percent of the current waiting list is comprised of households with 3 or fewer persons. Ten percent of the households on the waiting list have 4 or more members and another 10% have 5 or more members. Families in the last two categories have the most difficulty locating appropriate units.

The City's consolidated plans survey indicated numerous existing properties with rents in the \$300 to low \$400 range for 1-2 bedroom units and \$400 -500 range for 3 bedroom units. When first surveyed in early 2000 for the Consolidated Plan and in a September, 2000 update, most of these apartment complexes had at least a few vacancies, but none had a significant number. A number of "mom and pop" landlords also provide scattered site housing in single family units and small apartment buildings available to Section 8/voucher holders.

Section 8 certificates are also available in Muskegon through the Michigan State Housing Development Agency (MSHDA). MSHDA currently allocates 153 certificates in Muskegon. Forty-three certificates are issued to elderly or disabled households, while the remainder are issued to family heads of household.

In 1990, 1,763 or 22% of the City's total owner-occupied households had incomes at or below 50% of area median income. Of these, 22.8% were small families, 6.1% were large families and 55% were elderly families with one or two members. (The recent NIC housing market study focused on homeownership demand, however it used a primary market area that was significantly larger than the City and would not be directly comparable. From a trend standpoint, it is worth noting that the NIC primary market area—which includes the City of Muskegon, Muskegon Heights, Roosevelt Park, and portions of Muskegon Township—has an estimated 56% of owner-occupied households with incomes below 50% of area median. When combined with data indicating that the fastest growing age segment is the over-62 category, this suggests a need for programs that address aging-in-place as well as housing options for low-income seniors who become unable to reside in their homes).

The City's Comprehensive Plan noted that 76% of the owner-occupied housing units built before 1940 were occupied by very low-income families in 1990. These households generally lack the income to maintain older units, and as a result, the City's older housing continues to suffer from deferred maintenance and deterioration.

The Housing Commission has 14 single family units occupied under a lease-to-own program and 13 single-family units intended for homeownership which are recurrently vacant. Eight of the vacant units which were intended for rehab have been boarded for a number of years.

Other Low Income (from 51 -80% of median income)

The City's Comprehensive Plan indicated that in 1990, 1,183 (18.4%) of the City's renter households had incomes between 51% and 80% of the median income. Unlike families with incomes below 50% of median, the families in this income category who are cost-burdened are ineligible for public housing or rental assistance.

Low-income renters occupy 50% of the older rental units (built before 1940) in the City. Combined, very-low and low-income renters occupy 93% of the rental units built before 1940 in Muskegon. This tends to limit rents that can be charged for these units and also limits resources available for maintenance and upkeep of rental units.

The Comprehensive Plan indicates that in 1990, 1,364 (17%) of the City's owner-occupied households had incomes between 51 -80% of the median. This is somewhat lower than the proportion of very-low income homeowners, due to the large number of very low-income elderly homeowners on fixed incomes. Minority homeowners in this income category experience a disproportionate incidence of housing problems. Overall, 19% of low-income homeowners reported experiencing housing problems compared with nearly 35% of minority households in this category.

Moderate Income (81 -95% of median income)

The Comprehensive Plan indicated that in 1990, 1,386 households (9%) were in the moderate-income category. Given relatively affordable housing costs for existing housing in the City (\$40,000 -65,000 range) and surrounding areas, this income category does not appear to face significant affordability barriers.

Homeless Individuals and Families

The 1999 Continuum of Care plan for the Muskegon area estimates that there are 1,000 homeless individuals and an estimated 24,000 more on the edge of homelessness based on the extreme poverty rate for the area. Given Muskegon's gross median rent of \$450, a greater percentage of poverty level family incomes are spent on rent and utilities. Risk of homelessness is exacerbated by the area's low level of homeownership, a high rate of substance abuse, domestic violence, teen difficulties in transitioning to independent living, a teen pregnancy rate that is 50% higher than the State, a large number of minimum or near-minimum wage positions, high drop-out rates from school and mental illness.

The area has limited resources to effectively intervene in prevention of homelessness and those resources that are available have not been well coordinated. Needs indicated in the comprehensive plan are for additional Section 8 vouchers, home repair programs, homeownership tax break programs and transitional housing opportunities.

The Continuum of Care Gaps Analysis for 1999 indicates the following housing needs:

	Estimated Need Inventory	Current	Unmet Need (Gap)
Transitional Housing			
Individuals	500	50	450
Families	400150250		
Permanent Housing			
Individuals 800		100	700
Families	1600	700900	

Special Needs Population

There are nearly 800 housing units for seniors in Muskegon. Most had a few vacancies when surveyed in September, 2000, consistent with normal (5%) vacancy rates. Virtually all of these units are intended for seniors who are able to live independently. Units with assisted living services and units designed to meet the needs of the frail elderly are generally available.

B. Housing Needs of Families on the Public Housing and Section 8 Tenant-Based Assistance Waiting Lists

State the housing needs of the families on the PHA's waiting list/s. **Complete one table for each type of PHA - wide waiting list administered by the PHA.** PHA may provide separate tables for site-based or sub-jurisdictional public housing waiting lists at their option.

Housing Needs of Families on the Waiting List			
Waiting list type: (select one) Date compiled: 12-12-01 - current data			
X Section 8 tenant-based assistance			
<input type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	66		
Extremely low income <= 30% AMI	56	84.8%	
Very low income			

Housing Needsof Familiesonthe WaitingList			
(>30%but<=50% AMI)	10	15.2%	
Lowincome (>50%but<80% AMI)	0	0	
Familieswith children	49	74.2%	
Elderlyfamilies	3	4.5%	
Familieswith Disabilities	16	24.2%	
Race/ethnicity	White12	18.2%	
Race/ethnicity	Black50	75.8%	
Race/ethnicity	Indian0	0	
Race/ethnicity	Asian0	0	
Other0	6.0%		
Characteristicsby BedroomSize (PublicHousing Only)			
1BR		N/A	
2BR		N/A	
3BR			
4BR			
5BR			
5+BR			
Istthewaitinglistclosed(selectone)? <input type="checkbox"/> NoXYes Ifyes: Howlonghasitbeenclosed(#ofmonths)?24months,since12/99 DoesthePHAexpecttoreopenthelistinthePHAPlanyear? <input type="checkbox"/> NoXYes DoesthePHApermitspecificcategoriesoffamiliesontothewaitinglist,evenif generallyclosed? <input type="checkbox"/> NoXYes			

C.StrategyforAddressingNeeds

ProvideabriefdescriptionofthePHA'sstrategyforaddressingthehousingneedsoffamiliesinthe jurisdictionandonthewaitinglist **INTHEUPCOMINGYEAR** ,andtheAgency'sreasonsfor choosingthisstrategy.

(1)Strategies

Need:Shortageofaffordablehousingforalleligiblepopulations

Strategy 1: Maximize the number of affordable units available to the PHA within its current resources by:

Select all that apply

- ☒ Employ effective maintenance and management policies to minimize the number of public housing units off -line
- ☒ Reduce turnover time for vacated public housing units
- ☒ Reduce time to renovate public housing units
- ☐ Seek replacement of public housing units lost to the inventory through mixed finance development
- ☐ Seek replacement of public housing units lost to the inventory through section 8 replacement housing resources
- ☐ Maintain or increase section 8 lease -uprates by establishing payment standards that will enable families to rent throughout the jurisdiction
- ☐ Undertake measures to ensure access to affordable housing among families assisted by the PHA, regardless of unit size required
- ☐ Maintain or increase section 8 lease -uprates by marketing the program to owners, particularly those outside of areas of minority and poverty concentration
- ☐ Maintain or increase section 8 lease -uprates by effectively screening Section 8 applicants to increase owner acceptance of program
- ☒ Participate in the Consolidated Plan development process to ensure coordination with broader community strategies
- ☐ Other (list below)

Strategy 2: Increase the number of affordable housing units by:

Select all that apply

- ☒ Apply for additional section 8 units should they become available
- ☐ Leverage affordable housing resources in the community through the creation of mixed -finance housing
- ☐ Pursue housing resources other than public housing or Section 8 tenant -based assistance.
- ☐ Other: (list below)

Need: Specific Family Types: Families at or below 30% of median

Strategy 1: Target available assistance to families at or below 30% of AMI

Select all that apply

- ☐ Exceed HUD federal targeting requirements for families at or below 30% of AMI in public housing
- ☐ Exceed HUD federal targeting requirements for families at or below 30% of AMI in tenant -based section 8 assistance

- ☐ Employadmissionspreferencesaimedatfamilieswiththeconomichardships
- X Adoptrentpoliciestosupportandencouragework
- ☐ Other:(listbelow)

Need:SpecificFamilyTypes:Familiesatorbelow50%ofmedian

Strategy1:Targetavailableassistanceto familiesatorbelow50%ofAMI

Selectallthatapply

- X Employadmissionspreferencesaimedatfamilieswhoareworking
- ☐ Adoptrentpoliciestosupportandencouragework
- ☐ Other:(listbelow)

Need:SpecificFamilyTypes:TheElderly

Strategy1: Targetavailableassistancetotheelderly:

Selectallthatapply

- X Seekdesignationofpublichousingfortheelderly
- ☐ Applyforspecial -purposevoucherstargetedtotheelderly,shouldtheybecome available
- ☐ Other:(listbelow)

Need:SpecificFamilyTypes:FamilieswithDisabilities

Strategy1: TargetavailableassistancetoFamilieswithDisabilities:

Selectallthatapply

- ☐ Seekdesignationofpublichousingforfamilieswithdisabilities
- X Carryoutthemodificationsneededinpublichousingbasedonthesection504 NeedsAssessmentforPublicHousing
- X Applyforspecial -purposevoucherstargetedtofamilieswithdisabilities, shouldtheybecomeavailable
- X Affirmativelymarkettolocalnon -profitagenciesshatassistfamilieswith disabilities
- ☐ Other:(listbelow)

Need:SpecificFamilyTypes:Racesorethnicitieswithdisproportionatehousing needs

Strategy1:IncreaseawarenessofPHAresourcesamongfamiliesofracesand ethnicitieswithdisproportionateneeds:

Selectifapplicable

- ☒ Affirmatively market to races/ethnicities shown to have disproportionate housing needs
- ☐ Other: (list below)

Strategy 2: Conduct activities to affirmatively further fair housing

Select all that apply

- ☒ Counsel section 8 tenants as to location of units outside of areas of poverty or minority concentration and assist them to locate those units
- ☒ Market these section 8 programs to owners outside of areas of poverty/minority concentrations
- ☐ Other: (list below)

Other Housing Needs & Strategies: (list needs and strategies below)

(2) Reasons for Selecting Strategies

Of the factors listed below, select all that influenced the PHA's selection of the strategies it will pursue:

- ☒ Funding constraints
- ☒ Staffing constraints
- ☒ Limited availability of sites for assisted housing
- ☐ Extent to which particular housing needs are met by other organizations in the community
- ☒ Evidence of housing needs as demonstrated in the Consolidated Plan and other information available to the PHA
- ☒ Influence of the housing market on PHA programs
- ☒ Community priorities regarding housing assistance
- ☒ Results of consultation with local or state government
- ☒ Results of consultation with residents and the Resident Advisory Board
- ☐ Results of consultation with advocacy groups
- ☐ Other: (list below)

2. Statement of Financial Resources

[24 CFR Part 903.79(b)]

List the financial resources that are anticipated to be available to the PHA for the support of Federal public housing and tenant-based Section 8 assistance programs administered by the PHA during the Plan year. Note: the table assumes that Federal public housing or tenant-based Section 8 assistance grant funds are expended on eligible purposes; therefore, uses of these funds need not be stated. For other funds, indicate the use for those funds as one of the following categories: public housing operations, public housing capital improvements, public housing safety/security, public housing supportive services, Section 8 tenant-based assistance, Section 8 supportive services or other.

FinancialResources: PlannedSourcesandUses		
Sources	Planned\$	PlannedUses
1. FederalGrants(FY2002grants)		
a) PublicHousingOperatingFund	\$346,280.00	
b) PublicHousingCapitalFund'02	-0-	
c) HOPEVIR revitalization	-0-	
d) HOPEVIDemolition	-0-	
e) AnnualContributionsfor Section 8Tenant -BasedAssistance	\$588,038.00	
f) PublicHousingDrugElimination Program(includinganyTechnical Assistancefunds)	-0-	
g) ResidentOpportunityandSelf - SufficiencyGrants	-0-	
h) CommunityDevelopmentBlock Grant	-0-	
i) HOME	-0-	
OtherFederalGrants(listbelow)		
PublicHousingCooperative Agreement -Security'01 -'02	\$125,000.00	
2.PriorYearFederalGrants (unobligatedfundsonly)(list below)		
1999CIAP	\$261,843.00	
2000CFP	\$257,853.00	
2001CFP	\$262,038.00	
3.PublicHousing DwellingRental Income		
	\$437,954.00	
4.Otherincome (listbelow)		
4.Non -federalsources (listbelow)		
Totalresources	\$2,279,006.00	

3.PHAPoliciesGoverningEligibility,Selection,andAdmissions

[24CFRPart903.79(c)]

A.PublicHousing

Exemptions: PHA that do not administer public housing are not required to complete subcomponent 3A.

(1)Eligibility

a. When does the PHA verify eligibility for admission to public housing? (select all that apply)

- ☐ When families are within a certain number of being offered a unit: (state number)
- ☐ When families are within a certain time of being offered a unit: (state time)
- X Other: (describe)
At the time the family applies/get on the waiting list, and during the screening process.

b. Which non-income (screening) factors does the PHA use to establish eligibility for admission to public housing (select all that apply)?

- X Criminal or Drug-related activity
- X Rental history
- ☐ Housekeeping
- ☐ Other (describe)

c. X Yes ☐ No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?

d. X Yes ☐ No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?

e. ☐ Yes X No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC authorized source) -

(2)WaitingListOrganization

a. Which methods does the PHA plan to use to organize its public housing waiting list
(select all that apply)

- ☒ Community-wide list
☐ Sub-jurisdictional lists
☐ Site-based waiting lists
☐ Other (describe)

b. Where may interested persons apply for admission to public housing?

- ☒ PHA main administrative office
☐ PHA development site management office
☐ Other (list below)

c. If the PHA plan to operate one or more site-based waiting lists in the coming year,
answer each of the following questions; if not, skip to subsection **(3) Assignment**

1. How many site-based waiting lists will the PHA operate in the coming year?

2. ☐ Yes ☐ No: Are any or all of the PHA's site-based waiting lists new for the
upcoming year (that is, they are not part of a previously HUD-
approved site-based waiting list plan)?
If yes, how many lists?

3. ☐ Yes ☐ No: May families be on more than one list simultaneously?
If yes, how many lists?

4. Where can interested persons obtain more information about and sign up to be on
the site-based waiting lists (select all that apply)?

- ☐ PHA main administrative office
☐ All PHA development management offices
☐ Management offices at developments with site-based waiting lists
☐ At the development to which they would like to apply
☐ Other (list below)

(3) Assignment

a. How many vacant unit choices are applicants ordinarily given before they fall to the
bottom of or are removed from the waiting list? (select one)

- ☒ One
☐ Two

☐ Three or More

b. X Yes ☐ No: Is this policy consistent across all waiting list types?

c. If answer to b is no, list variations for any other than the primary public housing waiting list/s for the PHA:

(4) Admissions Preferences

a. Income targeting:

☐ Yes X No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 40% of all new admissions to public housing to families at or below 30% of median area income?

b. Transfer policies:

In what circumstances will transfer take precedence over new admissions? (list below)

X Emergencies

X Overhoused

X Underhoused

☐ Medical justification

☐ Administrative reasons determined by the PHA (e.g., to permit modernization work)

☐ Resident choice: (state circumstances below)

☐ Other: (list below)

c. Preferences

1. ☐ Yes X No: Has the PHA established preferences for admission to public housing (other than date and time of application)? (If "no" is selected, skip to subsection **(5) Occupancy**)

2. Which of the following admission preferences does the PHA plan to employ in the coming year? (select all that apply from either former Federal preferences or other preferences)

Former Federal preferences:

☐ Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)

☐ Victims of domestic violence

☐ Substandard housing

☐ Homelessness

☐ High rent burden (rent is > 50 percent of income)

Other preferences: (select below)

- ☐ Working families and those unable to work because of age or disability
- ☐ Veterans and veterans' families
- ☐ Residents who live and/or work in the jurisdiction
- ☐ Those enrolled currently in educational, training, or upward mobility programs
- ☐ Households that contribute to meeting income goals (broad range of incomes)
- ☐ Households that contribute to meeting income requirements (targeting)
- ☐ Those previously enrolled in educational, training, or upward mobility programs
- ☐ Victims of reprisals or hate crimes
- ☐ Other preference(s) (list below)

3. If the PHA will employ admissions preferences, please prioritize by placing a "1" in the space that represents your first priority, a "2" in the box representing your second priority, and so on. If you give equal weight to one or more of these choices (either through an absolute hierarchy or through a points system), place the same number next to each. That means you can use "1" more than once, "2" more than once, etc.

Date and Time

Former Federal preferences:

Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
Victims of domestic violence
Substandard housing
Homelessness
High rent burden

Other preferences (select all that apply)

- ☐ Working families and those unable to work because of age or disability
- ☐ Veterans and veterans' families
- ☐ Residents who live and/or work in the jurisdiction
- ☐ Those enrolled currently in educational, training, or upward mobility programs
- ☐ Households that contribute to meeting income goals (broad range of incomes)
- ☐ Households that contribute to meeting income requirements (targeting)
- ☐ Those previously enrolled in educational, training, or upward mobility programs
- ☐ Victims of reprisals or hate crimes
- ☐ Other preference(s) (list below)

4. Relationship of preferences to income targeting requirements:

- ☐ The PHA applies preferences within income tiers

- ☐ Not applicable: the pool of applicant families ensure that the PHA will meet income targeting requirements

(5) Occupancy

a. What reference materials can applicants and residents use to obtain information about the rules of occupancy of public housing (select all that apply)

- X The PHA - resident lease
X The PHA's Admissions and (Continued) Occupancy policy
☐ PHA briefing seminars or written materials
☐ Other source (list)

b. How often must residents notify the PHA of changes in family composition? (select all that apply)

- ☐ At an annual reexamination and lease renewal
X Anytime family composition changes
☐ At family request for revision
☐ Other (list)

(6) Deconcentration and Income Mixing

a. ☐ Yes X No: Did the PHA's analysis of its family (general occupancy) developments to determine concentration of poverty indicate the need for measures to promote deconcentration of poverty or income mixing?

b. ☐ Yes X No: Did the PHA adopt any changes to its **admissions policies** based on the results of the required analysis of the need to promote deconcentration of poverty or to assure income mixing?

c. If the answer to b was yes, what changes were adopted? (select all that apply)

- ☐ Adoption of site based waiting lists
If selected, list targeted developments below:
- ☐ Employing waiting list "skipping" to achieve deconcentration of poverty or income mixing goals at targeted developments
If selected, list targeted developments below:
- ☐ Employing new admission preferences at targeted developments

If selected, list targeted developments below:

☐ Other (list policies and development targeted below)

d. ☐ Yes ☒ No: Did the PHA adopt any changes to **other** policies based on the results of the required analysis of the need for deconcentration of poverty and income mixing?

e. If the answer to d was yes, how would you describe these changes? (select all that apply)

- ☐ Additional affirmative marketing
- ☐ Actions to improve the marketability of certain developments
- ☐ Adoption or adjustment of ceiling rents for certain developments
- ☐ Adoption of rent incentives to encourage deconcentration of poverty and income-mixing
- ☐ Other (list below)

f. Based on the results of the required analysis, in which developments will the PHA make special efforts to attract or retain higher -income families? (select all that apply)

X Not applicable: results of analysis did not indicate a need for such efforts

☐ List (any applicable) developments below:

g. Based on the results of the required analysis, in which developments will the PHA make special efforts to assure access for lower -income families? (select all that apply)

X Not applicable: results of analysis did not indicate a need for such efforts

☐ List (any applicable) developments below:

B. Section 8

Exemptions: PHA that do not administer section 8 are not required to complete sub -component 3B. **Unless otherwise specified, all questions in this section apply only to the tenant -based section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).**

(1) Eligibility

a. What is the extent of screening conducted by the PHA? (select all that apply)

X Criminal or drug -related activity only to the extent required by law or regulation

☐ Criminal and drug -related activity, more extensively than required by law or regulation

- ☐ More general screening than criminal and drug -related activity (list factors below)
- ☐ Other (list below)
- b. X Yes ☐ No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?
- c. ☐ Yes X No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?
- d. ☐ Yes X No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC - authorized source)
- e. Indicate what kinds of information you share with prospective landlords? (select all that apply)
- ☐ Criminal and drug -related activity
- ☐ Other (describe below)

(2) Waiting List Organization

- a. With which of the following program waiting lists is the section 8 tenant -based assistance waiting list merged? (select all that apply)
- X None
- ☐ Federal public housing
- ☐ Federal moderate rehabilitation
- ☐ Federal project -based certificate program
- ☐ Other federal or local program (list below)
- b. Where may interested persons apply for admission to section 8 tenant -based assistance? (select all that apply)
- X PHA main administrative office
- ☐ Other (list below)

(3) Search Time

- a. X Yes ☐ No: Does the PHA give extensions on standard 60 -day period to search for a unit?

If yes, state circumstances below:

When PHA spot and landlord check confirms program -eligible vacancies are very few.

(4) Admissions Preferences

a. Income targeting

- ☐ Yes ☒ No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 75% of all new admissions to the section 8 program to families at or below 30% of median area income?

b. Preferences

1. ☒ Yes ☐ No: Has the PHA established preferences for admission to section 8 tenant-based assistance? (other than date and time of application) (if no, skip to subcomponent **(5) Special purpose section 8 assistance programs**)

2. Which of the following admission preferences does the PHA plan to employ in the coming year? (select all that apply from either former Federal preferences or other preferences)

Former Federal preferences

- ☐ Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
☐ Victims of domestic violence
☐ Substandard housing
☐ Homelessness
☐ High rent burden (rent is > 50 percent of income)

Other preferences (select all that apply)

- ☒ Working families and those unable to work because of age or disability
☒ Veterans and veterans' families
☐ Residents who live and/or work in your jurisdiction
☒ Those enrolled currently in educational, training, or upward mobility programs
☐ Household that contribute to meeting income goals (broad range of incomes)
☒ Household that contribute to meeting income requirements (targeting)
☐ Those previously enrolled in educational, training, or upward mobility programs
☐ Victims of reprisals or hate crimes
☒ Other preference(s) (list below)

Victims of domestic violence

3. If the PHA will employ admissions preferences, please prioritize by placing a "1" in the space that represents your first priority, a "2" in the box representing your second priority, and so on. If you give equal weight to one or more of these choices (either through an absolute hierarchy or through a points system), place the same number next to each. That means you can use "1" more than once, "2" more than once, etc.

1 DateandTime

FormerFederalpreferences

InvoluntaryDisplacement(Disaster,GovernmentAction,ActionofHousing
Owner,Inaccessibility,PropertyDisposition)
Victimsofdomesticviolence
Substandardhousing
Homelessness
Highrentburden

Otherpreferences(selectallthatapply)

- ☐ Workingfamiliesandthoseunabletoworkbecauseofageordisability
- ☐ Veteransandveterans'families
- ☐ Residentswholiveand/orworkinyourjurisdiction
- ☐ Thoseenrolledcurrentlyineducational,training,orupwardmobilityprograms
- ☐ Householdsthatcontributetomeetingincomegoals(broadrangeofincomes)
- ☐ Householdsthatcontributetomeetingincomerequirements(targeting)
- ☐ Thosepreviouslyenrolledineducational,training,orupwardmobility
programs
- ☐ Victims ofreprisalsorhatecrimes
- ☐ Otherpreference(s)(listbelow)

4.Amongapplicantsonthewaitinglistwithethequalpreferencestatus,howare
applicantsslected?(selectone)

- X Dateandtimeofapplication
- ☐ Drawing(lottery)orotherrandomchoicetechnique

5.IfthePHAplanstoemploypreferencesfor“residentstholiveand/orworkinthe
jurisdiction”(selectone)

- ☐ ThispreferencehaspreviouslybeenreviewedandapprovedbyHUD
- ☐ ThePHArequestsapprovalforthispreferencethroughthisPHAPlan

6.Relationshipofpreferencetoincometargetingrequirements:(selectone)

- ☐ ThePHAappliespreferenceswithinincometiers
- ☐ Notapplicable:thepoolofapplicantfamiliesensuresthatthePHAwillmeet
incometargetingrequirements

(5)SpecialPurposeSection8AssistancePrograms

a. In which documents or other reference materials are the policies governing eligibility, selection, and admission to any special -purpose section 8 program administered by the PHA contained? (select all that apply)

- ☒ The Section 8 Administrative Plan
☐ Briefing sessions and written materials
☐ Other (list below)

b. How does the PHA announce the availability of any special -purpose section 8 program to the public?

- ☒ Through published notices
☐ Other (list below)

4. PHA Rent Determination Policies

[24CFR Part 903.79(d)]

A. Public Housing

Exemptions: PHAs that do not administer public housing are not required to complete sub -component 4A.

(1) Income Based Rent Policies

Describe the PHA's income based rent setting policy/ies for public housing using, including discretionary (that is, not required by statute or regulation) income disregards and exclusions, in the appropriate spaces below.

a. Use of discretionary policies: (select one)

- ☐ The PHA will not employ any discretionary rent -setting policies for income based rent in public housing. Income -based rents are set at the higher of 30% of adjusted monthly income, 10% of unadjusted monthly income, the welfare rent, or minimum rent (less HUD mandatory deductions and exclusions). (If selected, skip to sub -component (2))

---or---

- ☒ The PHA employs discretionary policies for determining income based rent (If selected, continue to question b.)

b. Minimum Rent

1. What amount best reflects the PHA's minimum rent? (select one)

- ☐ \$0
☐ \$1-\$25
X \$26-\$50

2. X Yes ☐ No: Has the PHA adopted any discretionary minimum rent hardship exemption policies?

3. If yes to question 2, list these policies below :

c. Rents set at less than 30% than adjusted income

1. X Yes ☐ No: Does the PHA plan to charge rents at a fixed amount or percentage less than 30% of adjusted income?

2. If yes to above, list the amounts or percentages charged and the circumstances under which these will be used below:

- Flat rent of \$295 for one bedroom

d. Which of the discretionary (optional) deductions and/or exclusions policies does the PHA plan to employ (select all that apply)

X For the earned income of a previously unemployed household member

X For increases in earned income

☐ Fixed amount (other than general rent -setting policy)
If yes, state amount/s and circumstances below:

☐ Fixed percentage (other than general rent -setting policy)
If yes, state percentage/s and circumstances below:

☐ For household heads

X For other family members

☐ For transportation expenses

☐ For the non-reimbursed medical expenses of non-disabled or non-elderly families

X Other (describe below)

- Child care expenses
- For elderly or disabled, medical expenses that exceed 3% of annual income

e. Ceiling rents

1. Do you have ceiling rents? (rents set at a level lower than 30% of adjusted income) (select one)

- ☐ Yes for all developments
☐ Yes but only for some developments
☒ No

2. For which kinds of developments are ceiling rents in place? (select all that apply)

- ☐ For all developments
☐ For all general occupancy developments (not elderly or disabled or elderly only)
☐ For specified general occupancy developments
☐ For certain parts of developments; e.g., the high-rise portion
☐ For certain size units; e.g., larger bedroom sizes
☐ Other (list below)

3. Select the space or spaces that best describe how you arrive at ceiling rents (select all that apply)

- ☐ Market comparability study
☐ Fair market rents (FMR)
☐ 95th percentile rents
☐ 75 percent of operating costs
☐ 100 percent of operating costs for general occupancy (family) developments
☐ Operating costs plus debt service
☐ The "rental value" of the unit
☐ Other (list below)

f. Rent redeterminations:

1. Between income reexaminations, how often must tenants report changes in income or family composition to the PHA such that the changes result in an adjustment to rent? (select all that apply)

- ☐ Never
☐ At family option
☒ Anytime the family experiences an income increase
☐ Anytime a family experiences an income increase above a threshold amount or percentage: (if selected, specify threshold) _____
☐ Other (list below)

g. ☐ Yes ☒ No: Does the PHA plan to implement individual savings accounts for residents (ISAs) as an alternative to the required 12 month disallowance of earned income and phasing in of rent increases in the next year?

(2) Flat Rents

1. In setting the market -based flat rents, what sources of information did the PHA use to establish comparability? (select all that apply.)

- ☐ The section 8 rent reasonableness study of comparable housing
- ☒ Survey of rents listed in local newspaper
- ☒ Survey of similar unassisted units in the neighborhood
- ☐ Other (list/describe below)

B. Section 8 Tenant -Based Assistance

Exemptions: PHAs that do not administer Section 8 tenant -based assistance are not required to complete sub -component 4B. **Unless otherwise specified, all questions in this section apply only to the tenant -based section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).**

(1) Payment Standards

Describe the voucher payment standards and policies .

a. What is the PHA's payment standard? (select the category that best describes your standard)

- ☐ At or above 90% but below 100% of FMR
- ☒ 100% of FMR
- ☐ Above 100% but at or below 110% of FMR
- ☐ Above 110% of FMR (if HUD approved; describe circumstances below)

b. If the payment standard is lower than FMR, why has the PHA selected this standard? (select all that apply)

- ☐ FMRs are adequate to ensure success among assisted families in the PHA's segment of the FMR area
- ☐ The PHA has chosen to serve additional families by lowering the payment standard
- ☐ Reflects market or submarket
- ☐ Other (list below)

c. If the payment standard is higher than FMR, why has the PHA chosen this level? (select all that apply)

- ☐ FMRs are not adequate to ensure success among assisted families in the PHA's segment of the FMR area

- ☐ Reflects market or submarket
- ☐ To increase housing options for families
- ☐ Other (list below)

d. How often are payment standards reevaluated for adequacy? (select one)

- X Annually
- ☐ Other (list below)

e. What factors will the PHA consider in its assessment of the adequacy of its payment standard? (select all that apply)

- ☐ Success rates of assisted families
- X Rent burdens of assisted families
- ☐ Other (list below)

(2) Minimum Rent

a. What amount best reflects the PHA's minimum rent? (select one)

- ☐ \$0
- ☐ \$1-\$25
- X \$26-\$50

b. ☐ Yes X No: Has the PHA adopted any discretionary minimum rent hardship exemption policies? (if yes, list below)

5. Operations and Management

[24CFR Part 903.79(e)]

Exemptions from Component 5: High performing and small PHAs are not required to complete this section. Section 8 only PHAs must complete parts A, B, and C(2)

A. PHA Management Structure

Describe the PHA's management structure and organization.

(select one)

- X An organization chart showing the PHA's management structure and organization is attached.
- ☐ A brief description of the management structure and organization of the PHA follows:

B. HUD Programs Under PHA Management

List Federal programs administered by the PHA, number of families served at the beginning of the upcoming fiscal year, and expected turnover in each. (Use "NA" to indicate that the PHA does not operate any of the programs listed below.)

Program Name	Units or Families Served at Year Beginning	Expected Turnover
Public Housing	161	
Section 8 Vouchers	178	
Section 8 Certificates	0	
Section 8 Mod Rehab		
Special Purpose Section 8 Certificates/Vouchers (list individually)		
Public Housing Drug Elimination Program (PHDEP)		
Other Federal Programs (list individually)		

C. Management and Maintenance Policies

List the PHA's public housing management and maintenance policy documents, manuals and handbooks that contain the Agency's rules, standards, and policies that govern maintenance and management of public housing, including a description of any measures necessary for the prevention or eradication of pest infestation (which includes cockroach infestation) and the policies governing Section 8 management.

- (1) Public Housing Maintenance and Management: (list below)
 - Admissions and Continued Occupancy Policy
 - Flat Rent Policy
- (2) Section 8 Management: (list below)
 - Housing Choice Voucher Administrative Policy

6. PHA Grievance Procedures

[24 CFR Part 903.79(f)]

Exemptions from component 6: High performing PHAs are not required to complete component 6. Section 8 - Only PHAs are exempt from sub -component 6A.

A. Public Housing

1. ☐ Yes ☒ No: Has the PHA established any written grievance procedures in addition to federal requirements found at 24 CFR Part 966, Subpart B, for residents of public housing?

If yes, list additions to federal requirements below:

2. Which PHA offices should residents or applicants to public housing contact to initiate the PHA grievance process? (select all that apply)

- ☒ PHA main administrative office
☐ PHA development management offices
☐ Other (list below)

B. Section 8 Tenant -Based Assistance

1. ☐ Yes ☒ No: Has the PHA established informal review procedures for applicants to the Section 8 tenant -based assistance program and informal hearing procedures for families assisted by the Section 8 tenant -based assistance program in addition to federal requirements found at 24 CFR 982?

If yes, list additions to federal requirements below:

2. Which PHA offices should applicants or assisted families contact to initiate the informal review and informal hearing processes? (select all that apply)

- ☒ PHA main administrative office
☐ Other (list below)

7. Capital Improvement Needs

[24 CFR Part 903.79(g)]

Exemptions from Component 7: Section 8 only PHAs are not required to complete this component and may skip to Component 8.

A. Capital Fund Activities

Exemptions from sub -component 7A: PHAs that will not participate in the Capital Fund Program may skip to component 7B. All other PHAs must complete 7A as instructed.

(1) Capital Fund Program Annual Statement

Using parts I, II, and III of the Annual Statement for the Capital Fund Program (CFP), identify capital activities the PHA is proposing for the upcoming year to ensure long -term physical and social viability of its public housing developments. This statement can be completed by using the CFP Annual Statement tables provided in the table library at the end of the PHA Plan template **OR**, at the PHA's option, by completing and attaching a properly updated HUD -52837.

Select one:

☒ The Capital Fund Program Annual Statement is provided as an attachment to the PHA Plan at Attachment (state name) (MI066av01)

-or-

☐ The Capital Fund Program Annual Statement is provided below: (if selected, copy the CFP Annual Statement from the Table Library and insert there)

(2) Optional 5 - Year Action Plan

Agencies are encouraged to include a 5 - Year Action Plan covering capital work items. This statement can be completed by using the 5 Year Action Plan table provided in the table library at the end of the PHA Plan template **OR** by completing and attaching a properly updated HUD -52834.

a. ☒ Yes ☐ No: Is the PHA providing an optional 5 - Year Action Plan for the Capital Fund? (if no, skip to sub -component 7B)

b. If yes to question a, select one :

☒ The Capital Fund Program 5 - Year Action Plan is provided as an attachment to the PHA Plan at Attachment (state name) (MI066av01)

-or-

☐ The Capital Fund Program 5 - Year Action Plan is provided below: (if selected, copy the CFP Optional 5 Year Action Plan from the Table Library and insert here) The 5 - Year Action Plan is attached.

B. HOPE VI and Public Housing Development and Replacement Activities (Non - Capital Fund)

Applicability of sub -component 7B: All PHAs administering public housing. Identify any approved HOPE VI and/or public housing development or replacement activities not described in the Capital Fund Program Annual Statement.

☐ Yes ☒ No: a) Has the PHA received a HOPE VI revitalization grant? (if no, skip to question c; if yes, provide responses to question b for each grant, copying and completing as many times as necessary)
b) Status of HOPE VI revitalization grant (complete one set of questions for each grant)

1. Development name:
2. Development (project) number:
3. Status of grant: (select the statement that best describes the current status)

- ☐ Revitalization Plan under development
☐ Revitalization Plan submitted, pending approval
☐ Revitalization Plan approved
☐ Activities pursuant to an approved Revitalization Plan underway

☐ Yes ☐ No: c) Does the PHA plan to apply for a HOPE VI Revitalization grant in the Plan year?
 If yes, list development name/s below:

☐ Yes ☐ No: d) Will the PHA be engaging in any mixed -financed development activities for public housing in the Plan year?
 If yes, list developments or activities below:

☐ Yes ☐ No: e) Will the PHA be conducting any other public housing development or replacement activities not discussed in the Capital Fund Program Annual Statement?
 If yes, list developments or activities below:

8. Demolition and Disposition

[24CFR Part 903.79(h)]

Applicability of component 8: Section 8 only PHAs are not required to complete this section.

1. ☐ Yes ☐ No: Does the PHA plan to conduct any demolition or disposition activities (pursuant to section 18 of the U.S. Housing Act of 1937 (42 U.S.C. 1437p)) in the plan Fiscal Year? (If "No", skip to component 9; if "yes", complete one activity description for each development.)

2. Activity Description

☐ Yes ☐ No: Has the PHA provided the activities description information in the **optional** Public Housing Asset Management Table? (If "yes", skip to component 9. If "No", complete the Activity Description table below.)

Demolition/Disposition Activity Description
--

1a. Development name: Scattered sites	-Homeownership
1b. Development (project) number: MI066	-001
2. Activity type: Demolition <input checked="" type="checkbox"/> Disposition <input checked="" type="checkbox"/>	
3. Application status (select one) Approved <input type="checkbox"/> Submitted, pending approval <input checked="" type="checkbox"/> Planned application <input type="checkbox"/>	
4. Date application approved, submitted, or planned for	submission: (DD/MM/YY)
5. Number of units affected: 8	
6. Coverage of action (select one) <input checked="" type="checkbox"/> Part of the development <input type="checkbox"/> Total development	
7. Timeline for activity: a. Actual or projected start date of activity: 3/1/2002 b. Projected end date of activity: 7/1/2002	

9. Designation of Public Housing for Occupancy by Elderly Families or Families with Disabilities or Elderly Families and Families with Disabilities

[24 CFR Part 903.79(i)]

Exemptions from Component 9; Section 8 only PHAs are not required to complete this section.

- 1 Yes ☒ No: Has the PHA designated or applied for approval to designate or does the PHA plan to apply to designate any public housing for occupancy only by the elderly families or only by families with disabilities, or by elderly families and families with disabilities or will apply for designation for occupancy by only elderly families or only families with disabilities, or by elderly families and families with disabilities as provided by section 7 of the U.S. Housing Act of 1937 (42 U.S.C. 1437e) in the upcoming fiscal year? (If "No", skip to component 10. If "yes", complete one activity description for each development, unless the PHA is eligible to complete a streamlined submission; PHAs completing streamlined submissions may skip to component 10.)
2. Activity Description
Yes ☒ No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? If "yes", skip to component 10. If "No", complete the Activity Description table below.

Designation of Public Housing Activity Description	
1a. Development name:	
1b. Development (project) number: N/A	
2. Designation type:	
Occupancy by only the elderly	<input type="checkbox"/>
Occupancy by families with disabilities	<input type="checkbox"/>
Occupancy by only elderly families and families with disabilities	<input type="checkbox"/>
3. Application status (select one)	
Approved; included in the PHA's Designation Plan	<input type="checkbox"/>
Submitted, pending approval	<input type="checkbox"/>
Planned application	<input type="checkbox"/>
4. Date this designation approved, submitted, or planned for submission: (DD/MM/YY)	
5. If approved, will this designation constitute a (select one)	
<input type="checkbox"/> New Designation Plan	
<input type="checkbox"/> Revision of a previously -approved Designation Plan?	
6. Number of units affected:	
7. Coverage of action (select one)	
<input type="checkbox"/> Part of the development	
<input type="checkbox"/> Total development	

10. Conversion of Public Housing to Tenant -Based Assistance

[24CFR Part 903.79(j)]

Exemptions from Component 10; Section 8 only PHAs are not required to complete this section.

A. Assessment of Reasonable Revitalization Pursuant to section 202 of the HUD FY1996 HUD Appropriations Act

1. ☐ Yes ☐ No: Have any of the PHA's developments or portions of developments been identified by HUD or the PHA as covered under section 202 of the HUD FY1996 HUD Appropriations Act? (If "No", skip to component 11; if "yes", complete one activity description for each identified development, unless eligible to complete a streamlined submission. PHAs completing streamlined submissions may skip to component 11.)

2. Activity Description

☐ Yes ☐ No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? If "yes", skip to component 11. If "No", complete the Activity Description table below.

Conversion of Public Housing Activity Description
1a. Development name: 1b. Development (project) number: N/A
2. What is the status of the required assessment? <input type="checkbox"/> Assessment underway <input type="checkbox"/> Assessment results submitted to HUD <input type="checkbox"/> Assessment results approved by HUD (if marked, proceed to next question) <input type="checkbox"/> Other (explain below)
3. <input type="checkbox"/> Yes <input type="checkbox"/> No: Is a Conversion Plan required? (If yes, go to block 4; if no, go to block 5.)
4. Status of Conversion Plan (select the statement that best describes the current status) <input type="checkbox"/> Conversion Plan in development <input type="checkbox"/> Conversion Plan submitted to HUD on: (DD/MM/YYYY) <input type="checkbox"/> Conversion Plan approved by HUD on: (DD/MM/YYYY) <input type="checkbox"/> Activities pursuant to HUD - approved Conversion Plan underway
5. Description of how requirements of Section 202 are being satisfied by means other than conversion (select one) <input type="checkbox"/> Units addressed in a pending or approved demolition application (date submitted or approved:) <input type="checkbox"/> Units addressed in a pending or approved HOPE VI demolition application (date submitted or approved:) <input type="checkbox"/> Units addressed in a pending or approved HOPE VI Revitalization Plan (date submitted or approved:) <input type="checkbox"/> Requirements no longer applicable: vacancy rates are less than 10 percent <input type="checkbox"/> Requirements no longer applicable: site now has less than 300 units <input type="checkbox"/> Other: (describe below)

B. Reserved for Conversions pursuant to Section 22 of the U.S. Housing Act of 1937

C. Reserved for Conversions pursuant to Section 33 of the U.S. Housing Act of 1937

11. Homeownership Programs Administered by the PHA

[24 CFR Part 903.79(k)]

See Homeownership Plan 5(h) dated February 17, 1997, as well as information regarding Muskegon Housing Commission's Turnkey III Program.

A. Public Housing

Exemptions from Component 11A: Section 8 only PHAs are not required to complete 11A.

1. X Yes ☐ No: Does the PHA administer any homeownership programs administered by the PHA under an approved section 5(h) homeownership program (42 U.S.C. 1437c(h)), or an approved HOPE I program (42 U.S.C. 1437aaa) or has the PHA applied or plan to apply to administer any homeownership programs under section 5(h), the HOPE I program, or section 32 of the U.S. Housing Act of 1937 (42 U.S.C. 1437z -4). (If "No", skip to component 11B; if "yes", complete one activity description for each applicable program/plan, unless eligible to complete a streamlined submission due to **small PHA** or **high performing PHA** status. PHAs completing streamlined submissions may skip to component 11B.)

2. Activity Description

☐ Yes X No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? (If "yes", skip to component 12. If "No", complete the Activity Description table below.)

Public Housing Homeownership Activity Description (Complete one for each development affected)
1a. Development name: Scattered Sites 5(h) 1b. Development (project) number: MI066 -5
2. Federal Program authority: <input type="checkbox"/> HOPEI X 5(h) <input type="checkbox"/> Turnkey III <input type="checkbox"/> Section 32 of the USHA of 1937 (effective 10/1/99)
3. Application status: (select one) X Approved; included in the PHA's Homeownership Plan/Program <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application
4. Date Homeownership Plan/Program approved, submitted, or planned for submission: (DD/MM/YYYY)
5. Number of units affected:
6. Coverage of action: (select one)

☐ Part of the development
X Total development

B. Section 8 Tenant Based Assistance

1. ☐ Yes X No: Does the PHA plan to administer a Section 8 Homeownership program pursuant to Section 8(y) of the U.S.H.A. of 1937, as implemented by 24 CFR part 982? (If "No", skip to component 12; if "yes", describe each program using the table below (copy and complete questions for each program identified), unless the PHA is eligible to complete a streamlined submission due to high performer status. **High performing PHAs** may skip to component 12.)

2. Program Description:

a. Size of Program

- ☐ Yes X No: Will the PHA limit the number of families participating in the section 8 homeownership option?

If the answer to the question above was yes, which statement best describes the number of participants? (select one)

- ☐ 25 or fewer participants
☐ 26- 50 participants
☐ 51 to 100 participants
☐ more than 100 participants

b. PHA -established eligibility criteria

- ☐ Yes X No: Will the PHA's program have eligibility criteria for participation in its Section 8 Homeownership Option program in addition to HUD criteria?
If yes, list criteria below:

12. PHA Community Service and Self -sufficiency Programs

[24 CFR Part 903.79(l)]

Exemptions from Component 12: High performing and small PHAs are not required to complete this component. Section 8 - Only PHAs are not required to complete sub -component C.

A. PHA Coordination with the Welfare (TANF) Agency

1. Cooperative agreements:

X Yes ☐ No: Has the PHA entered into a cooperative agreement with the TANF Agency, to share information and/or target supportive services (as contemplated by section 12(d)(7) of the Housing Act of 1937)?

If yes, what was the date that agreement was signed? DD/MM/97

2. Other coordination efforts between the PHA and TANF agency (select all that apply)

- X Client referrals
- X Information sharing regarding mutual clients (for rent determinations and otherwise)
- ☐ Coordinate the provision of specific social and self-sufficiency services and programs to eligible families
- ☐ Jointly administer programs
- ☐ Partner to administer a HUD Welfare-to-Work voucher program
- ☐ Joint administration of other demonstration program
- ☐ Other (describe)

B. Services and programs offered to residents and participants

(1) General

a. Self-Sufficiency Policies

Which, if any of the following discretionary policies will the PHA employ to enhance the economic and social self-sufficiency of assisted families in the following areas? (select all that apply)

- X Public housing rent determination policies
- X Public housing admissions policies
- X Section 8 admissions policies
- X Preference in admission to section 8 for certain public housing families
- ☐ Preferences for families working or engaging in training or education programs for non-housing programs operated or coordinated by the PHA
- X Preference/eligibility for public housing homeownership option participation
- ☐ Preference/eligibility for section 8 homeownership option participation
- ☐ Other policies (list below)

b. Economic and Social self-sufficiency programs

- ☐ Yes ☐ No: Does the PHA coordinate, promote or provide any program to enhance the economic and social self-sufficiency of residents? (If "yes", complete the following table; if "no" skip to sub-component 2, Family Self

Sufficiency Programs. The position of the table may be altered to facilitate its use.)

Services and Programs				
Program Name & Description (including location, if appropriate)	Estimated Size	Allocation Method (waiting list/random selection/specific criteria/other)	Access (development office/ PHA main office/ other provider name)	Eligibility (public housing or section 8 participants or both)

(2) Family Self Sufficiency program/s

a. Participation Description – Dissolved in 1999

Family Self Sufficiency (FSS) Participation		
Program	Required Number of Participants (start of FY 2000 Estimate)	Actual Number of Participants (As of: DD/MM/YY)
Public Housing		
Section 8	50	

- b. ☐ Yes ☒ No: If the PHA is not maintaining the minimum program size required by HUD, does the most recent FSS Action Plan address the steps the PHA plan to take to achieve at least the minimum program size?
If no, list steps the PHA will take below:

C. Welfare Benefit Reductions

1. The PHA is complying with the statutory requirements of section 12(d) of the U.S.

Housing Act of 1937 (relating to the treatment of income changes resulting from welfare program requirements) by: (select all that apply)

- ☒ Adopting appropriate changes to the PHA's public housing rent determination policies and train staff to carry out those policies
- ☒ Informing residents of new policy on admission and reexamination
- ☒ Actively notifying residents of new policy at times in addition to admission and reexamination.
- ☒ Establishing or pursuing a cooperative agreement with all appropriate TANF agencies regarding the exchange of information and coordination of services
- ☒ Establishing a protocol for exchange of information with all appropriate TANF agencies
- ☐ Other: (list below)

D. Reserved for Community Service Requirement pursuant to section 12(c) of the U.S. Housing Act of 1937

13. PHA Safety and Crime Prevention Measures

[24 CFR Part 903.79(m)]

Exemptions from Component 13: High performing and small PHAs not participating in PHDEP and Section 8 Only PHAs may skip to component 15. High performing and small PHAs that are participating in PHDEP and are submitting a PHDEP Plan with this PHA Plan may skip to sub component D.

A. Need for measures to ensure the safety of public housing residents

1. Describe the need for measures to ensure the safety of public housing residents

(select all that apply)

- ☒ High incidence of violent and/or drug -related crime in some or all of the PHA's developments
- ☒ High incidence of violent and/or drug -related crime in the area surrounding or adjacent to the PHA's developments
- ☒ Residents fearful for their safety and/or the safety of their children
- ☒ Observed lower -level crime, vandalism and/or graffiti
- ☐ People on waiting list unwilling to move into one or more developments due to perceived and/or actual level of violent and/or drug -related crime
- ☒ Other (describe below)
Now waiting list because of drugs, violence, reputation of the Housing Commission, four year history of absentee landlord, grossly inadequate maintenance, no security before 2000

2. What information or data did the PHA use to determine the need for PHA actions to improve safety of residents (select all that apply).

- X Safety and security survey of residents
- X Analysis of crime statistics over time for crimes committed "in and around" public housing authority
- ☐ Analysis of cost trends over time for repair of vandalism and removal of graffiti
- X Resident reports
- X PHA employee reports
- X Police reports
- ☐ Demonstrable, quantifiable success with previous or ongoing anti-crime/anti-drug programs
- X Other (describe below)
Security incident reports (security implanted 10/2000)

3. Which developments are most affected? (list below)
Hartford Terrace

B. Crime and Drug Prevention activities the PHA has undertaken or plan to undertake in the next PHA fiscal year

1. List the crime prevention activities the PHA has undertaken or plan to undertake: (select all that apply)

- X Contracting with outside and/or resident organizations for the provision of crime- and/or drug -prevention activities
- ☐ Crime Prevention Through Environmental Design
- ☐ Activities targeted to at -risk youth, adults, or seniors
- ☐ Volunteer Resident Patrol/Block Watchers Program
- ☐ Other (describe below)

2. Which developments are most affected? (list below)
Hartford Terrace

C. Coordination between PHA and the police

1. Describe the coordination between the PHA and the appropriate police precincts for carrying out crime prevention measures and activities: (select all that apply)

- ☐ Police involvement in development, implementation, and/or ongoing evaluation of drug -elimination plan
- ☐ Police provide crime data to housing authority staff for analysis and action
- ☐ Police have established a physical presence on housing authority property (e.g., community policing office, officer in residence)
- X Police regularly testify in and otherwise support eviction cases (occasionally)
- ☐ Police regularly meet with the PHA management and residents

- ☐ Agreement between PHA and local law enforcement agency for provision of above-baseline law enforcement services
- ☐ Other activities (list below)
2. Which developments are most affected? (list below)
- Hartford Terrace

D. Additional information as required by PHDEP/PHDEP Plan

PHA eligible for FY2000 PHDEP funds must provide a PHDEP Plan meeting specified requirements prior to receipt of PHDEP funds.

- ☐ Yes X No: Is the PHA eligible to participate in the PHDEP in the fiscal year covered by this PHA Plan?
- ☐ Yes X No: Has the PHA included the PHDEP Plan for FY2002 in this PHA Plan?
- ☐ Yes X No: This PHDEP Plan is an Attachment. (Attachment Filename: ____)

14. RESERVED FOR PET POLICY

[24CFR Part 903.79(n)]

15. Civil Rights Certifications

[24CFR Part 903.79(o)]

Civil rights certifications are included in the PHA Plan Certification of Compliance with the PHA Plans and Related Regulations.

16. Fiscal Audit

[24CFR Part 903.79(p)]

1. X Yes ☐ No: Is the PHA required to have an audit conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h))? (If no, skip to component 17.)
2. X Yes ☐ No: Was the most recent fiscal audit submitted to HUD?
3. X Yes ☐ No: Were there any findings as the result of that audit?
4. X Yes ☐ No: If there were any findings, do any remain unresolved? If yes, how many unresolved findings remain? __7__
5. ☐ Yes X No: Have responses to any unresolved findings been submitted to HUD? If not, when are they due (state below)?
12/31/2001

17. PHA Asset Management

Exemptions from component 17: Section 8 Only PHAs are not required to complete this component.
High performing and small PHAs are not required to complete this component.

1. X Yes ☐ No: Is the PHA engaging in any activities that will contribute to the long-term asset management of its public housing stock, including how the Agency will plan for long-term operating, capital investment, rehabilitation, modernization, disposition, and other needs that have **not** been addressed elsewhere in this PHA Plan?
2. What types of asset management activities will the PHA undertake? (select all that apply)
- ☐ Not applicable
- ☐ Private management
- ☐ Development-based accounting
- X Comprehensive stock assessment
- ☐ Other: (list below)
3. ☐ Yes X No: Has the PHA included description of asset management activities in the **optional** Public Housing Asset Management Table?

18. Other Information

[24CFRPart903.79(r)]

A. Resident Advisory Board Recommendations

1. X Yes No: Did the PHA receive any comments on the PHA Plan from the Resident Advisory Board/s?
2. If yes, the comments are: (if comments were received, the PHA **MUST** select one)
- X Attached at Attachment (Filename)
- ☐ Provided below:
3. In what manner did the PHA address those comments? (select all that apply)
- ☐ Considered comments, but determined that no changes to the PHA Plan were necessary.
- X The PHA changed portions of the PHA Plan in response to comments
- List changes below:
- ☐ Other: (list below)

B. Description of Election process for Residents on the PHA Board

1. ☐ Yes ☒ No: Does the PHA meet the exemption criteria provided section 2(b)(2) of the U.S. Housing Act of 1937? (If no, continue to question 2; if yes, skip to sub-component C.)
2. ☒ Yes ☐ No: Was there a resident who serves on the PHA Board elected by the residents? (If yes, continue to question 3; if no, skip to sub-component C.)

3. Description of Resident Election Process

a. Nomination of candidates for place on the ballot: (select all that apply)

- ☐ Candidates were nominated by resident and assisted family organizations
- ☒ Candidates could be nominated by any adult recipient of PHA assistance
- ☒ Self-nomination: Candidates registered with the PHA and requested a place on ballot
- ☒ Other: (describe)
Candidates solicited by Resident Association, management. Brief biographies, position statements distributed, public meeting at Hartford Terrace for candidates to speak, election by paper ballot, winner certified by City Clerk's office, recommended name to City, City made the appointment.

b. Eligible candidates: (select one)

- ☐ Any recipient of PHA assistance
- ☐ Any head of household receiving PHA assistance
- ☒ Any adult recipient of PHA assistance
- ☐ Any adult member of a resident or assisted family organization
- ☐ Other (list)

c. Eligible voters: (select all that apply)

- ☒ All adult recipients of PHA assistance (public housing and section 8 tenant based assistance)
- ☐ Representatives of all PHA resident and assisted family organizations
- ☐ Other (list)

C. Statement of Consistency with the Consolidated Plan

For each applicable Consolidated Plan, make the following statement (copy questions as many times as necessary).

1. Consolidated Plan jurisdiction: (provide name here)

2. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply)

- ☒ The PHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s.
- ☒ The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
- ☒ The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
- ☐ Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)

- ☐ Other: (list below)

4. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)

D. Other Information Required by HUD

Use this section to provide any additional information requested by HUD.

Attachments

Use this section to provide any additional attachments referenced in the Plans.

PHA Plan Table Library

Component 7 Capital Fund Program Annual Statement Parts I, II, and III CAPITAL GRANT 2001

Annual Statement Capital Fund Program (CFP) Part I: Summary

Capital Fund Grant Number MI33P06650101 FFY of Grant Approval: (2001)

X Original Annual Statement

Line No.	Summary by Development Account	Total Estimated Cost
1	Total Non - CGP Funds	
2	1406 Operations	\$26,203
3	1408 Management Improvements	\$20,000
4	1410 Administration	12,000
5	1411 Audit	-0-
6	1415 Liquidated Damages	-0-
7	1430 Fees and Costs	20,000
8	1440 Site Acquisition	-0-
9	1450 Site Improvement	\$38,000
10	1460 Dwelling Structures	\$46,835
11	1465.1 Dwelling Equipment - Nonexpendable	-0-
12	1470 Nondwelling Structures	-0-
13	1475 Nondwelling Equipment	\$82,000
14	1485 Demolition	-0-
15	1490 Replacement Reserve	-0-
16	1492 Moving to Work Demonstration	-0-
17	1495.1 Relocation Costs	-0-
18	1498 Mod Used for Development	-0-
19	1502 Contingency	\$17,000
20	Amount of Annual Grant (Sum of lines 2 - 19)	\$262,038
21	Amount of line 20 Related to LBP Activities	-0-
22	Amount of line 20 Related to Section 504 Compliance	-0-
23	Amount of line 20 Related to Security	-0-
24	Amount of line 20 Related to Energy Conservation Measures	\$68,000

Annual Statement
Capital Fund Program (CFP) Part II: Supporting Table

CAPITAL GRANT 2001

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Cost
MI066-4	Replace Assembly Room air handling unit (AHU) and air conditioning unit	1475	\$14,000.00
MI066-4	Replace office area air handling unit (AHU) and air conditioning unit	1475	\$11,000.00
MI066-4	Replace lobby and smoking room furniture	1475	\$9,000.00
MI066-4	Replace rooftop air handling unit (AHU)	1475	\$35,000.00
MI066-4	New carpet in Lobby and Smoking Room	1475	\$5,000.00
MI066-4	Exterior paved stone patio and grill area	1450	\$8,000.00
MI066-4	20' X 24' pole barn addition to existing	1450	\$15,000.00
MI066-4	Landscaping – shrubs, raised garden, Flowers	1450	\$15,000.00
MI066-4	Apartment carpet replacement 30 units	1460	\$24,000.00
MI066-4	Return air recovery units for rooftop (AHU)	1475	\$8,000.00
MI066-5	Home ownership-Phase I	1460	\$22,835.00
MI1066-4,5	Contingency	1470	\$17,000.00
	Total Capital items		\$183,835.00

AnnualStatement
CapitalFun dProgram(CFP)PartIII:ImplementationSchedule

CAPITALGRANT2001

Development Number/Name HA-WideActivities	AllFundsObligated (QuarterEndingDate)	AllFundsExpended (QuarterEndingDate)
MI066-04 Hartford Terrace	09-30-02	4-30-03
MI066-05 Homeownership 5(h)		
H.A. -Wide		

Optional Table for 5 -Year Action Plan for Capital Fund (Component 7)

Complete one table for each development in which work is planned in the next 5 PHA fiscal years. Complete a table for any PHA-wide physical or management improvements planned in the next 5 PHA fiscal year. Copy this table as many times as necessary. Note: PHAs need not include information from Year One of the 5 -Year cycle, because this information is included in the Capital Fund Program Annual Statement.

Optional 5 -Year Action Plan Tables				
Development Number	Development Name (or indicate PHA wide)	Number Vacant Units	% Vacancies in Development	
	Hartford Terrace	2	1.4%	
Description of Needed Physical Improvements or Management Improvements			Estimated Cost	Planned Start Date (HA Fiscal Year)
Total estimated cost over next 5 years				

Optional Public Housing Asset Management Table

See Technical Guidance for instructions on the use of this table, including information to be provided.

Public Housing Asset Management								
Development Identification		Activity Description						
Name, Number, and Location	Number and Type of units	Capital Fund Program Parts II and III <i>Component 7a</i>	Development Activities <i>Component 7b</i>	Demolition/disposition <i>Component 8</i>	Designated housing <i>Component 9</i>	Conversion <i>Component 10</i>	Home-ownership <i>Component 11a</i>	Other (describe) <i>Component 17</i>

pet privilege fee of \$150.00. It is expressly understood and agreed by the resident the pet privilege fee does not constitute a security deposit and is not refundable.

Sick or Injured Animals

No sick or injured pet will be accepted for occupancy. Admitted pets which suffer illness or injury must be immediately taken for veterinarian care at the resident pet owner's expense.

Rule Enforcement

Any resident who receives two (2) letters of violation of these pet rules and a letter of intent describing these violations from the management of the Muskegon Housing Commission, may be required, after private conference to remove the pet from the premises, and provide management with a signed affidavit stating that the dog or cat is no longer on the premises and will not return in the future. Misrepresentation of this affidavit will be grounds for eviction of the resident.

Management exercises the right to act immediately in insisting an offending pet be removed forthwith in situations deemed to be of an emergency nature. In such instances, management will act as specified in the section on "alternate caretaker" in removing a sick, or diseased, injured and/or aggressive animal.

19.0 REPAYMENT AGREEMENTS

When a resident with a flat rent agreement owes the Muskegon Housing Commission back charges and is unable to pay the balance by the due date, the resident may request that the Muskegon Housing Commission allow them to enter into a Repayment Agreement. The Muskegon Housing Commission, on a case-by-case basis has the sole discretion of whether to accept such an agreement. All Repayment Agreements must assure that the full payment is made within a period not to exceed twelve (12) months. All Repayment Agreements must be in writing and signed by both parties. Failure to comply with the Repayment Agreement terms may subject the Resident to eviction procedures.

Note: If the housing commission has a minimum rent greater than \$0, they must allow for repayment agreements for those tenants whose rental amount is the minimum rent and who have had their rent abated for a temporary period.

20.0 TERMINATION

18.0 PET POLICY

18.1 EXCLUSIONS

The ownership of pets in Co
accordance with the approved

The policy does not apply to
disabilities. Assisting animals
restrictions other than those in
associated facilities in a decent
disturbing their neighbors. (24

Definition

*For the purpose of these pet
animals traditionally kept in a
commercial purposes.*

*To have, or keep common house
other dangerous breeds), a c.
hamster, guinea pig and rabbit
fish.*

Except where otherwise indicated

*At no time will the Muskegon E.
snakes, monkeys, game pets, etc*

*Animals assisting the handicapped,
the pet's training to assist*

Muskegon Housing Commission
Muskegon, Michigan

**Admissions and Continued
Occupancy Policy**

November 10, 2000

*cated, and the income levels of the families on
lysis, we will determine the level of marketing
incentives to implement.*

TIVES

ssion may offer one or more incentives to
e income classification would help to meet the
mission.

: different times, or under different conditions,
nsistent and nondiscriminatory manner.

ommission discovers that a unit will become
family on the waiting list who has the highest
velopment and whose income category would
bal and/or the income-targeting goal.

ion will contact the family first by *first-class*
nit offer. The family will be given five (5)
letter was mailed to contact the Muskegon
offer.

rtunity to view the unit. After the opportunity
re two (2) business days to accept or reject the
y's decision must be documented in the tenant
the unit, the Muskegon Housing Commission
nting the offer and the rejection.

the Muskegon Housing Commission skipped
st in order to meet their deconcentration goal
oncentration incentive and the family rejects
eir place on the waiting list and will not be

sion did not skip over other families on the
not offer any other deconcentration incentive,
out good cause, the family will forfeit their
nily will keep their preferences, but the date
ged to the date and time the unit was rejected.

e any unit offered, they would not lose their
includes reasons related to health, proximity
lose working or going to school). The family

a larger size unit unless the family size changes after initial

han assigned through the above guidelines – A family may
ger unit size than the guidelines allow. The Muskegon
mission will allow the larger size unit if the family provides
dical need that the family be housed in a larger unit (*except
tip*).

families on the waiting list for a larger size, smaller families
d if they sign a release form stating they will transfer (at the
expense) to the appropriate size unit when an eligible family
rger unit applies. The family transferring will be given a 30-
ore being required to move (*except homeownership*).

may be offered in order to improve the marketing of a
suffering a high vacancy rate.

THE WAITING LIST

g Commission shall follow the statutory requirement that at
mitted families in any fiscal year be families whose annual
)% of the area median income. To insure this requirement is
monitor the incomes of newly admitted families and the
; on the waiting list. If it appears that the requirement to
come families will not be met, we will skip higher income
list to reach extremely low-income families.

extremely low-income families on the waiting list we will
non-discriminatory basis to attract extremely low-income
utory requirement.

IN POLICY

ng Commission's policy to provide for deconcentration of
e income mixing by bringing higher income families into
ments and lower income families into higher income
this end, we will skip families on the waiting list to reach
lower or higher income. We will accomplish this in a
minating manner.

ng Commission will affirmatively market our housing to
ups. Lower income residents will not be steered toward
ments and higher income people will not be steered
developments.

of each fiscal year, we will analyze the income levels of
h of our developments, the income levels of census tracts

1 housing choice to very low income households. The list of units will be [provided at front desk/mailed on request] and provided at briefings.

e staff of the Housing Commission initiates personal contact with private property owners and managers by conducting formal and informal discussions and meetings.

ated material is offered to acquaint owners and managers with the opportunities available under the program.

: Housing Commission has active participation in a community based organization(s) comprised of private property and apartment owners and managers.

Housing Commission will actively recruit property owners with property located in high poverty areas of minority and poverty concentration and apply for exception payment standards if the Housing Commission determines it is necessary to make the program more accessible in the Housing Commission's jurisdiction.

Housing Commission encourages program participation by owners of units located in high poverty areas of minority and poverty concentration. The Housing Commission periodically evaluates the demographic distribution of assisted families to identify areas in the jurisdiction where owner outreach should be targeted. The purpose of these activities is to provide more choice and better housing opportunities to families. Voucher holders are informed of a broad range of areas where they may lease units inside the Housing Commission's jurisdiction and given a list of landlords or other parties who are willing to lease units or help families who desire to live outside areas of poverty or minority concentration.

Housing Commission works with a nonprofit agency through the regional counseling program who contacts others in the area, identifies families in the program, and counsel families on their prospective move and services available in the areas in which they are interested.

Housing Commission shall periodically:

Request the HUD Field Office to furnish a list of HUD-held properties available for rent.

Develop working relationships with owners and real estate broker associations.

Establish contact with civic, charitable or neighborhood organizations which have an interest in housing for low-income families and public agencies concerned with obtaining housing for displacements.

Explain the program, including equal opportunity requirements and nondiscrimination requirements, including Fair Housing Amendment Act of 1988 and Americans with Disabilities Act, to real estate agents, landlords, and other groups that have dealings with low-income families or are interested in housing such families.

ny and all information which would lead one to determine a person's disability must be kept in a separate folder and returned to the family member after its use. The personal information must be released except on an "as needed" basis in cases where consideration. All requests for access and granting of access to information must be approved by Director of Program Management.

The Housing Commission's practices and procedures are designed to protect the privacy of applicants and program participants. All applications are stored in a secure location which is only accessible by authorized personnel.

MILY OUTREACH [24 CFR 982.153(b)(1)]

The Housing Commission will publicize and disseminate information regarding the availability of housing assistance and related services for a regular basis. When the Housing Commission's waiting list is closed, the Commission will publicize the availability and nature of housing assistance to some families in a newspaper of general circulation, minimum means. Notices will also be provided in Spanish.

For each persons who cannot read the newspapers, the Housing Commission will distribute fact sheets to the broadcasting media, and initiate contact with members of the news media and community service personnel. The Housing Commission will also utilize public service announcements.

The Housing Commission will communicate the status of housing assistance provided in the community, and advise them of housing opportunities in order that they can make proper referrals for housing.

OWNER OUTREACH [24 CFR 982.54(d)(5), 982.153(b)(2)]

The Housing Commission makes a concerted effort to keep the program attractive by making changes in the tenant-based program, which are designed to be attractive to owners. This includes informing participants of changes in program requirements.

The Housing Commission encourages owners of decent, safe, and sound housing to Section 8 families.

The Housing Commission conducts periodic meetings with private owners to improve owner relations and to recruit new owners.

The Housing Commission maintains a list of units available for rent and updates this list at least weekly. When listings from owners are received, they are compiled by the Housing Commission staff by bedroom size.

The Housing Commission will maintain lists of available housing units in various neighborhoods within the Housing Authority's jurisdiction.

Supervisory quality control reviews will be performed by a qualified person other than the person who performed the work, as required by HUD, on the following SEM factors:

- Selection from the waiting list
- Rent reasonableness
- Determination of adjusted income
- HQS Enforcement
- HQS Quality Control

The annual sample of files and records will be drawn in an unbiased manner, leaving a clear audit trail.

The minimum sample size to be reviewed will relate directly to each factor.

RECORDS FOR MONITORING HOUSING COMMISSION PERFORMANCE

In order to demonstrate compliance with HUD and other pertinent regulations, the Housing Commission will maintain records, reports and other documentation for that which is in accordance with HUD requirements and in a manner that will allow an auditing professional or other interested party to follow, monitor and or assess the Housing Commission's operational procedures objectively and with accuracy and in accordance with SEMAP requirements with internal supervisory audits.

In addition to the required SEMAP documentation, supervisory staff audit the following:

- Not less than 100% of reexaminations
- Not less than 100% of new applications
- Not less than 100% of claims processed

PRIVACY RIGHTS [24 CFR 982.551]

Applicants and participants, including all adults in their households, are required to sign HUD 9886 Authorization for Release of Information. This document incorporates the Federal Privacy Act Statement and describes the conditions under which HUD/Housing Commission will release family information.

The Housing Commission's policy regarding release of information is in accordance with state and local laws which may restrict the release of family information.

* Number of applicants and participants in the jurisdiction who do not speak English and speak the other language.

* Estimated cost to Housing Commission per client of translation of English written documents into the other language.

* The availability of local organizations to provide translation services to non-English speaking families.

* Availability of bilingual staff to provide translation for non-English speaking families.

1.8 MANAGEMENT ASSESSMENT OBJECTIVES

The Housing Commission operates its housing assistance program with efficiency and can demonstrate to HUD auditors that the Housing Commission is using its resources in a manner that reflects its commitment to quality and service. The Housing Commission policies and practices are consistent with the areas of measurement for the following HUD SEMAP indicators.

- Selection from the Waiting List
- Reasonable Rent
- Determination of Adjusted Income
- Utility Allowance Schedule
- HQS Quality Control Inspections
- HQS Enforcement
- Expanding Housing Opportunities
- FMR/Exception Rent & Payment Standards
- Annual Re-examinations
- Correct Tenant Rent Calculations
- Pre-Contract HQS Inspections
- Annual HQS Inspections
- Lease-up
- Family Self-Sufficiency Enrollment and Escrow Account Balances
- Bonus Indicator Deconcentration

Reasonable accommodation will be made for persons with a disability to use advocate or accessible offices. A designee will be allowed to provide services but only with the permission of the person with the disability.

All Housing Commission mailings will be made available in an accessible format upon request, as a reasonable accommodation.

Verification of Disability

The Housing Commission will verify disabilities under definitions in the Rehabilitation Act of 1973, Section 504 of the Rehabilitation Act of 1973, and the Americans with Disabilities Act.

* Outreach

Outreach efforts will include notification of the Housing Commission Board as well as all other media and agencies listed in the Housing Commission Administrative Plan regarding public notices (see section on opening a waiting list in "Applying for admission" chapter.)

Applying for Admission

All persons who wish to apply for any of the Housing Commission's programs must submit a pre-application as indicated in our public notice. Applications will be available in an accessible format upon request from a person with a disability.

To provide specific accommodation to persons with disabilities, upon request, information may be mailed to the applicant and, if requested, it will be provided in an accessible format.

The full application is completed at the eligibility appointment in the applicant's handwriting, unless assistance is needed, or a request for accommodation is made by a person with a disability. Applicants will then be interviewed by Housing Commission staff to review the information on the full application form. Verification of information relates to 504, Fair Housing, or ADA reasonable accommodation will be provided at that time. The full application will also include questions asking all applicants if any reasonable accommodations are necessary.

1.7 TRANSLATION OF DOCUMENTS

* The Housing Authority has bilingual staff to assist non-English speaking applicants following languages Spanish and translates documents into the following languages: Spanish.

In determining whether it is feasible to provide translation of documents from English into other languages; the Housing Commission will consider the following factors:

those who do not have disabilities and is applicable to all situations described in this Administrative Plan including when a family initiates contact with the Housing Commission, when the Housing Commission schedules or reschedules appointments of any kind.

* To be eligible to request a reasonable accommodation, the requester must first certify (if apparent) or verify (if not apparent) that they are a person with a disability under the following ADA definition:

- A physical or mental impairment that substantially limits one or more of the major life activities of an individual;
- A record of such impairment; or
- Being regarded as having such an impairment

Note: This is not the same as the HUD definition used for purposes of determining allowances.

Rehabilitated former drug users and alcoholics are covered under the ADA. However, a current drug user is not covered. In accordance with 5.403(a), individuals are not considered disabled for eligibility purposes solely on the basis of any drug or alcohol dependence. Individuals whose drug or alcohol addiction is a material factor to their disability are excluded from the definition. Individuals are considered disabled if disabling mental and physical limitations would persist if drug or alcohol abuse discontinued.

Once the person's status as a qualified person with a disability is confirmed, the Housing Commission will require that a professional third party competent to make the assessment, provides written verification that the person needs the specific accommodation due to their disability and the change is required for them to have equal access to the housing program.

If the Housing Commission finds that the requested accommodation creates an undue administrative or financial burden, the Housing Commission will either deny the request and/or present an alternate accommodation that will still meet the need of the person.

An undue administrative burden is one that requires a fundamental alteration of the essential functions of the Housing Commission (i.e., waiving a family obligation).

An undue financial burden is one that when considering the available resources of the agency as a whole, the requested accommodation would pose a severe financial hardship on the Housing Commission.

The Housing Commission will provide a written decision to the person requesting the accommodation within 30 days. If a person is denied the accommodation or feels that the alternative suggestions are inadequate, they may request an informal hearing to review the Housing Commission's decision.

ousing Commission shall not deny any family or individual the equal opportunity for or receive assistance under the Section 8 Programs on the basis of race, color, religion, creed, national or ethnic origin, age, familial [or marital] status, handicap or sex [or sexual orientation].

er its commitment to full compliance with applicable civil Rights laws, the Housing Commission will provide Federal/State/local information to Voucher holders regarding unlawful discrimination and any recourse available to families who believe they are victims of a discriminatory act. Such information will be made available during the initial briefing session, and all applicable Fair Housing Information and Complaint Forms will be made a part of the Voucher holder's briefing and available upon request at the front desk.

ing Authority staff will be required to attend fair housing training and informed of the importance of affirmatively furthering fair housing and providing equal opportunity to all families, including providing reasonable accommodations to persons with disabilities, as a part of the overall commitment to quality customer service. Fair Housing posters are posted throughout the Housing Authority offices, including in the waiting and interview rooms and the equal opportunity logo will be used on all outreach materials. Staff will attend local fair housing update training sponsored by HUD and maintain an organization to keep current with new developments.

otherwise provided in 24 CFR 8.21(c)(1), 8.24(a), 8.25, and 8.31, no individual with disabilities shall be denied the benefits of, be excluded from participation in, or be subjected to discrimination because the Housing Commission's facilities are inaccessible to or unusable by persons with disabilities. Posters and housing information will be placed in locations throughout the Housing Commission's office in such a manner as to be easily readable from a wheelchair.

egon Housing Commission office(s) are accessible to persons with disabilities. A sign for the hearing impaired is provided by the TTD (616) 235-2600.

ABLE ACCOMMODATIONS POLICY [24 CFR 700.245(c)(3)]

Policy of this Housing Commission to be service-directed in the administration of its programs, and to exercise and demonstrate a high level of professionalism in providing housing services to families.

Any person with a disability must first ask for a specific change to a policy or practice that would accommodate their disability before the Housing Commission will treat a person differently than anyone else. The Housing Commission's policies and practices are designed to provide assurances that persons with disabilities will be given reasonable accommodations, upon request, so that they may fully access and utilize the program and related services. The availability of requesting an accommodation is made known by including notices on Housing Commission forms and letters. This policy is intended to afford persons with disabilities an equal opportunity to obtain the same benefit, to gain the same benefit, or to reach the same level of achievement as

1.2 ADMINISTRATIVE FEE RESERVE [24 CFR 982.54(d)(22)]

Expenditures from the Administrative Reserve (Operating Reserve) for other housing purposes will be approved by the Muskegon Housing Commissioners.

1.3 RULES AND REGULATIONS [24 CFR 982.52]

This Administrative Plan is set forth to define the Housing Commission's local policies for operation of the housing programs in the context of Federal laws and Regulations. All issues related to Section 8 not addressed in this document are governed by such Federal regulations, HUD Memos, Notices and guidelines, or other applicable laws.

1.4 TERMINOLOGY

The Muskegon Housing Commission is referred to as Housing Commission.

"Family" is used interchangeably with "Applicant" or "Participant" and can refer to a single person family.

"Tenant" is used to refer to participants in terms of their relation to landlords.

"Landlord" and "owner" are used interchangeably.

"Disability" is used where "handicap" was formerly used.

"Non-citizens Rule" refers to the regulation effective June 19, 1995 restricting assistance to U.S. citizens and eligible immigrants.

The Section 8 programs are also known as the Regular Tenancy Certificate, Over-FMR Tenancy (OFTO) and Voucher Programs. The Voucher Choice program refers to the merged program effective as of 8/12/99.

"HQS" means the Housing Quality Standards required by regulations as enhanced by the Housing Commission.

"Failure to Provide" refers to all requirements in the First Family Obligations. See "Denial or Termination of Assistance" chapter.

"Merger date" refers to October 1, 1999, which is the effective date of the merging of the Section 8 Certificate and Voucher program into the Housing Choice Voucher Program.

See Glossary for other terminology.

1.5 FAIR HOUSING POLICY [24 CFR 982.54(d)(6)]

It is the policy of the Housing Authority to comply fully with all Federal, State, and local nondiscrimination laws and with the rules and regulations governing Fair Housing and Equal Opportunity in housing and employment.

Chapter 1

STATEMENT OF POLICIES AND OBJECTIVES

1.0 INTRODUCTION

The Section 8 Program was enacted as part of the Housing and Community Development Act of 1974, which recodified the U.S. Housing Act of 1937. The Act has been amended from time to time, and its requirements, as they apply to the Section 8 Tenant-Based Assistance Program, is described in and implemented throughout this Administrative Plan. The Section 8 rental assistance programs are federally funded and administered for the County of Muskegon by the Muskegon Housing Commission through its Section 8 housing office.

Administration of the Section 8 Program and the functions and responsibilities of the Housing Commission staff shall be in compliance with the Housing Commission's Personnel Policy and the Department of Housing and Urban Development (HUD) Section 8 Regulations as well as all Federal, State and local Fair Housing Laws and Regulations.

Jurisdiction

The jurisdiction of the Muskegon Housing Commission is the County of Muskegon.

1.1 PURPOSE OF THE PLAN [24 CFR 982.54]

The purpose of the Administrative Plan is to establish policies for carrying out the programs in a manner consistent with HUD requirements and local goals and objectives contained in the Agency Plan. The Housing Choice Voucher Program is implemented as of 10/1/99; pre-merger Regular Tenancy Contracts, Housing Voucher Contracts, and Over-Fair Market Rent Tenancy Contracts will remain in effect until the family's second reexamination after the merger date or whenever a new lease is executed, whichever comes first.

The Housing Commission is responsible for complying with all changes in HUD regulations pertaining to these programs. If such changes conflict with this Plan, HUD regulations will have precedence. The original Plan and any changes must be approved by the Board of Housing Commissioners of the agency, the pertinent sections included in the Agency Plan, and a copy provided to HUD.

Applicable regulations include:

24 CFR Part 5: General Program Requirements

24 CFR Part 8: Nondiscrimination

24 CFR Part 982: Section 8 Tenant-Based Assistance

to ensure that a comprehensive approach to the coordination of services is used so participants find meaningful unsubsidized employment. The Committee will also propose changes to the Action Plan if determined necessary to accomplish the overall goals and objectives of the Family Self-Sufficiency Program.

H. PROGRAM COORDINATOR

The program coordinator of the FSS Program has the responsibility of handling day-to-day administration of the FSS Program, conducting orientations, executing the Contract of Participation inclusive of monitoring, evaluating, screening and handling correspondence with agencies.

The Coordinator will also conduct research as requested by the Coordinating Committee, provide the Committee with minutes of committee meetings, inform the committee members of unforeseen issues and anticipated resources if needed, handle referrals to FSS participants, draft policy, write proposals for funding and ensure that the needed resources requested by the FSS families are followed up on. In addition, the Coordinator will be responsible for quarterly newsletters and periodic group support meetings.

The Coordinator will also submit annual reports to HUD regarding FSS Program activities explaining the effectiveness of the program and monitoring activities provided to families to achieve economic independence.

* * * * *

certifies that, to the best of his/her knowledge and participating family no longer receives federal, state assistance for housing.

shall be forfeited if:

family has failed to meet its obligations under the contract; inclusive of the FSS family who moves out of the jurisdiction; or
family is no longer under a Contract of Participation for federal or state welfare assistance at the expiration of the contract or extensions.

FSS participant will be treated as program recipient in accordance with HUD requirements governing

the right to withdraw funds from its FSS Account, the contract, disburse a portion of the of the funds from the contract period for Contract-related expenses if the

terminate Contract goals, and
FSS Account funds for purposes consistent with the

for other school costs
expenses
transportation expenses
transportation is unavailable or inaccessible to the

NG COMMITTEE

composed of representatives from the following

College

agency
mission

the committee could be expanded to include other local public entities believed to have existing available resources to assist families in achieving self-sufficiency.

the overall responsibility for planning and program, targeting and selecting program participants

- A program participant is ineligible to receive subsidy for two (2) months if termination from employment is a "voluntary quit", or if participant is terminated for "not reporting to work". No penalty is invoked if termination is demanded by the employer due to job/services being ended.
- To prevent receiving a program penalty for the second month participant must secure new employment which is comparable in salary or hours to the job they quit, prior to the start of the second months penalty being enacted.

This policy is necessary as families are quitting their jobs to increase their monthly HAP thereby decreasing their tenant rent; families may quit to get rent lowered then start a new job without contacting the Housing Commission.

Such a policy will also encourage those who are working to continue working, which will enable us to service more families on our waiting list and will enable those who are participating in Family Self-Sufficiency to reach their goals earlier.

F. OTHER PROGRAM ELEMENTS

1. Homeownership – Scattered Site Program

The Muskegon Housing Commission acquired 189 units of Turnkey III scattered site housing for the Homeownership Program. Presently, there are 13 units remaining. The Housing Commission will attempt, through this homeownership program, sponsored by HUD, to provide homeownership opportunities to low to moderate-income families currently residing in the City of Muskegon.

Also, the Housing Commission developed a homeownership plan for 25 scattered site, single family homes that were developed from Development Funds. In keeping with the goal of HUD's initiative, the Commission anticipates offering these housing units to FSS participants who could use their accrued escrow account as a down payment.

2. Escrow Accounts

The Housing Commission shall re-establish a FSS Escrow Account for each family participating in the FSS Program. During the term of the Contract of Participation, the Housing Commission will credit the FSS Account the amount of the FSS credit determined in accordance with the "Family Contribution."

For this purpose, the Family Contribution shall mean:

Escrow funds held by the Housing Commission shall be held in escrow and invested in HUD approved investments. Investment income shall be credited periodically, but no less than annually, to each participating family's FSS account.

Withdrawal of such funding to FSS families shall not occur until:

- a) The Housing Commission determines the participating family has met its obligations under the Contract of Participation, and

The Muskegon Housing Commission has established several partnerships with a variety of public/private organizations within the Muskegon Community. These partnerships have been the necessary vehicle in delivering a consortium of public/private resources and services deemed necessary for participants to obtain and maintain economic independence.

E. SUPPORT SERVICES

The Family Self-Sufficiency (FSS) Program does not directly contract for, pay for, or purchase these services but serves as a resource or coordinating link for program participants.

1. Child Care

Child care and monetary assistance for child care have been identified by the Housing Commission as essential requirements in order for a FSS participant to reap the benefits of an educational and/or job training program; as well as maintain full-time employment.

The Commission will identify the need for child care assistance whether it be monetary or in guidance of securing a child care provider, and will provide monetary assistance for child care purposes to FSS participants.

2. Transportation

Transportation resources will also be identified in order to satisfy the needs of participants for this type of assistance.

3. Job Development and Job Placement

The Commission will assess the FSS participants' employability needs and will provide appropriate training and work experience to develop the FSS participants' job skills.

Job Development will be accomplished through enrollment into a job-training program; followed by a job internship for certain training programs that will be optional for FSS participants.

Once employment has been secured, the Commission staff will monitor program participants during the first ninety-(90) days on the job to ensure total compliance.

The Muskegon Housing Commission Board adopted a policy dated September 14, 1995 which reads as follows:

Assistant maintains owner payment schedules. The Financial Assistant for check forms to be submitted to the Accountant's Office for a reasonable time in advance of the due date of the payments to owners. Each check must be signed by the Executive Director and must indicate the date and the amount due which must correspond with the data stored in the system. Checks will be prepared and sent to owners.

Section 8 and Assistance for Participating Families

Assistance from the Housing Commission staff is available during the hours of the work week. The Section 8 Coordinators have extensive knowledge of Federal and State rental laws and can inform Section 8 tenants.

Family Circumstances, Rents, Utilities, and Housing Quality

Re-examination of family income and circumstances are detailed in the Section 8 Administrative Plan.

Section 8 and Family Moves

Family moves are detailed in the Section 8 Administrative Plan. Tenants are notified of their obligation to notify both the landlord and the Housing Commission (30) days in advance in writing of their intentions to move prior to the event of evictions, owners' request for eviction will be reviewed for legitimate reasons to evict under Michigan State Law and that necessary legal procedures.

A new certificate or voucher for the following:

- the dwelling unit or having unpaid rent.
- Housing Commission any money

Upon re-orientation, the families will be apprised of their responsibilities under the "Family Responsibilities."

If a family is determined to be ineligible for continued rental assistance, they may request an informal hearing by the Housing Commission to contest the decision. If the decision to terminate Section 8 assistance is in accordance with the law, Housing Commission rules. The procedure for an informal hearing is detailed in the "Section 8 Existing Regulations Establishing Admission and Continued Assistance."

The Housing Commission staff will conduct Section 8 orientation sessions and will issue Section 8 vouchers. All Section 8 program requirements and forms will be explained to the participants during these sessions.

Written verification of income is required from the applicant's employer, and if not employed, from his/her source of income, such as the Family Independence Agency, etc.

The Section 8 Coordinator performs the calculation of the Total Tenant Payment and Rent Credit. The Section 8 Coordinator checks the lease packets for accuracy and conformity with HUD regulations before the Executive Director's final approval is granted.

2. Briefing of Families and Issuance of Certificates or Vouchers

Upon establishing the eligibility of the family, the Section 8 Coordinator briefs the head of household in requirements verbally and in writing, and explains the "Dwelling Unit Inspection Report" which must be completed by the tenant. Additionally, the family is notified of the means to redress discrimination in the housing market, if they feel they have been treated inappropriately. The HUD brochure 63-EO (10), "Fair Housing U.S.A.", is disbursed to the family at the time of briefing. The orientation to the Section 8 Program is held in-group format followed by briefings, which are performed individually for each family.

In case of complaints of discrimination in housing, the staff is available to refer the complainants to legal and administrative sources for assistance.

3. Housing Quality Standards and Inspections

The Muskegon Housing Commission uses the HUD Housing Quality Standards inspection booklet as the first step in determining the acceptability of the dwelling unit. Prior to a staff inspection for Housing Quality Standards, the tenant is encouraged to complete the "Dwelling Unit Inspection Report." Therefore, tenants provide the first level of screening for acceptable housing units. The Section 8 Coordinator makes an initial inspection to determine if the unit is suitable according to Housing Quality Standards as well as a subsequent re-inspection to assure compliance with Housing Quality Standards if necessary.

4. Lease Approval and Housing Assistance Payments Contract Execution

Prospective tenants explain the Section 8 program to owners, who are asked to sign the Request for Lease approval. Rental property owners are also advised that further information can be acquired from the staff of the Housing Commission. The Commission's regulations on leasing may be found in the Section 8 Administrative Plan.

limited to the number and identity of participating family members and supportive services provided to the participating family. All changes may be granted provided that contract modifications are consistent with the objectives of the FSS Program.

The person/s designated in the Contract of Participation as head/s of household shall be required under the contract to seek and maintain suitable employment. Suitable employment will be determined by both parties and will be based upon the person's skills, education, and the availability of job opportunities within the jurisdiction served by the Housing Commission.

Termination of the Contract of Participation

A Contract of Participation may be terminated before expiration of the term by any of the following:

- (a) When the Housing Commission determines that the Head or participating family member has failed to fulfill the terms of contract and any extensions thereof.
- (b) Withdrawal of the family from the FSS Program.
- (c) Mutual consent of both parties.
- (d) By such other act as deemed inconsistent with the purposes of the FSS Program.
- (e) When the family no longer receives any federal, state, local or other public assistance for housing in accordance with page 2 of the Contract of Participation.
- (f) By operation of law.

HOUSING COMPONENT

The staff of the Muskegon Housing Commission currently administers the Section 8 program. The Coordinator will implement the program with the assistance of the Executive Director. The Executive Director will perform internal monitoring functions and will oversee the preparation of all necessary reports and requisitions. This is accomplished by a monthly review of the Section 8 Housing Program, which is undertaken to determine the status of all leases under contract and Housing Voucher contracts.

The Section 8 Coordinator will inform families of the Section 8 Program on a one-on-one basis and will assist in the check preparation process for the distribution to owners.

The FSS Program Coordinator will provide FSS candidates with an extensive overview of program guidelines and a brief overview of the rules and regulations of the Section 8 Rental Assistance Program.

Housing Commission will handle inquiries regarding the Family Self-Sufficiency Program. The FSS Coordinator will identify all program participants according to the FSS Program requirements. The Coordinator enrolls potential FSS participants into the Program by the completed and signed Contract of Participation. This contract is individually designed by the participant with input and assistance of the FSS Coordinator, and attached to the Individual Training and Services Plan for each head of the family. Additional adult (over 18 years old) family members may also participate by signing a Contract of Participation and having specific Individual Training and Services Plans.

FSS participants may avail themselves of various training programs with projected completion dates sanctioned by the training agency. Behaviors such as attendance, willingness to work, willingness to learn, ability to work with supervision, ability to plan and organize work, will be evaluated at least quarterly by the training agency. Program enrollment will be confirmed by the head of household signing a Contract of Participation and by adhering to the stipulations of the signed Contract which outlines continued enrollment and completion of a training program or maintaining employment.

B. FSS Contract of Participation

All FSS Program participants will be required to sign and fulfill a Contract of Participation as part of the FSS Program requirements. The effective date of the contract will be on the first day of the month following execution of the Contract of Participation.

The contract sets forth the provisions of the FSS Program and will specify the resources and supportive services that will be made available as well as outlining the responsibilities and obligations of the FSS family.

The Contract of Participation as prescribed by HUD shall indicate, among other things, that the Housing Commission may withhold FSS supportive services and/or escrow monies, if the participating family fails to comply with the requirements as outlined in the signed contract.

The contract shall indicate the specific obligations to which the family has committed and the length of the contract. The length of the contract shall not exceed five (5) years unless the Housing Commission extends the term of the contract at the family's request. If both parties agree upon an extension, the extension shall be in writing and shall not exceed two years. The extension shall include a description of the need for such and the Housing Commission must substantiate in writing that good cause exists for granting it. For the purposes of this contract, "good cause" shall include but not be limited to any circumstances beyond the control of the participating family such as serious illness or involuntary loss of employment. In the event that the Housing Commission finds grounds to grant an extension, the Housing Commission may make certain requirements to which the participant must adhere during the term of the extension (i.e. substance abuse counseling). Both parties, the Housing Commission and the FSS family, may mutually agree to make the necessary changes to the contract. Changes may include but will not

The Housing Commission anticipates that with the resources provided by the local employment programs, the families selected for the Family Self-Sufficiency Program would be well served.

The Coordinating Committee for the Family Self-Sufficiency (FSS) Program is comprised of representatives from local public and private sectors within the Muslim Community. The Coordinating Committee will assist the Housing Commission in securing commitments and resources from all sectors as well as overseeing the plan and implementation of the FSS Program.

The Coordinating Committee will ensure that a comprehensive approach is taken in securing resources and commitments in the coordination of job training and support services of public and private resources. The result will be that the placement of FSS participants will be in meaningful unsubsidized employment.

B. SELECTION OF FSS PARTICIPANTS

Outreach to Families

The Muskegon Housing Commission currently maintains a caseload for the Section 8 Rental Assistance Program. The Housing Commission solicits families for the Family Self-Sufficiency Program from Section 8 participants.

The Muskegon Housing Commission is required to enroll participants who are Section 8 voucher holders, and will be willing to execute a Contract of Participation for the FSS Program and receive the full benefits of the escrow savings account.

The FSS Program is geared toward serving what is known as the "At Risk Group." This group is largely defined as individuals who are long-term dependents of government assistance, unemployed, underemployed, or homeless with little or no job experience whose family size ranges from 2 to 3 children; who are living in substandard housing and are paying more than 50% of their monthly income for rent.

FSS applicants will be selected without regard to race, color, religion, gender, handicap, familial status or national origin. Candidates will be selected from the current participants in the rental voucher program.

Participants in the Section 8 program will not lose their housing or eligibility for declining participation in the FSS Program.

- **Completion of Applications, Determinations of Eligibility and Selection of FSS Families**
- **Selection of FSS Families**

~~CONFIDENTIAL~~

Family self-sufficiency (FSS) is designed to promote the development of local strategies to coordinate the use of housing assistance with job training and other community supportive activities.

The Muskegon Housing Commission (MHC) has tailored this self-sufficiency program to provide a comprehensive approach to assessment and/or employment services. This will allow very low-income and transitional housing families the opportunity to develop their capabilities to become self-sufficient members of our community.

Through a special allocation of Section 8 Vouchers provided by the U.S. Department of Housing and Urban Development, the Housing Commission will coordinate and implement the Family self-sufficiency (FSS) Program.

In implementing the FSS Program the Housing Commission will work with the area's welfare agency to provide a wide range of vocational, occupational and educational training services based on individual needs assessments.

A primary component of the Commission's FSS Program is to identify the needs of program participants. Through needs assessment, such as childcare services, counseling, on-the-job training, and job placement assistance which are required elements to obtain and maintain economic self-sufficiency.

MHC will enter into agreements with various public and private organizations within the Muskegon community, providing necessary job-related services that have been identified in the individual participant's need assessment.

The Housing Commission has developed the following direct referral relationships to allow FSS participants to access more highly skilled trade or professional development programs.

- Muskegon Community College (MCC)
- Visiting Nurses
- Family Independence Agency
- Michigan Security Commission

The Muskegon Community College offers a wide variety of academic, technical and occupational training opportunities including auto repair, furniture making, welding, computer data entry and secretarial work.

The Housing Commission anticipates that with the resources provided by the employment programs, the families selected for the Family Self-Sufficiency Program would be well served.

The Coordinating Committee for the Family Self-Sufficiency (FSS) Program is comprised of representatives from local public and private sectors within the Muskegon Community. The Coordinating Committee will assist the Housing Commission in securing commitments and resources from all sectors as well as overseeing the implementation of the FSS Program.

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FSS applicants will be selected without regard to race, color, religion, gender, handicap, marital status or national origin. Candidates will be selected from the current pool of participants in the rental voucher program.

Participants in the Section 8 program will not lose their housing or eligibility for the Section 8 program by declining participation in the FSS Program.

- **Completion of Applications, Determinations of Eligibility and Selection of FSS Families**
- **Selection of FSS Families**

FSS ACTION PLAN - Section

Chapter 20

FAMILY SELF-SUFFICIENCY PROGRAM

A. OVERALL OBJECTIVE AND PROGRAM APPROACH

Family self-sufficiency (FSS) is designed to promote the development of local to coordinate the use of housing assistance with job training and other commur supportive activities.

The Muskegon Housing Commission (MHC) has tailored this self-sufficiency p provide a comprehensive approach to assessment and/or employment services. allow very low-income and transitional housing families the opportunity to dev capabilities to become self-sufficient members of our community.

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RAB = comments
= reply



EGON HOUSING COMMISSION 1080 Terrace Street • Muskegon, MI 49442 • 231-722-2647 • Fax 231-722-9503

MEMORANDUM

email: mhct823@aol.com

DATE: June 4, 2002
TO: Board of Commissioners
FROM: Yvonne Morrissey, Assistant Housing Director *ym*
SUBJECT: Comments from 12/11/01 Resident Advisory Board and Response

Comments:

1. Wasn't aware FSS program was available to clients outside of Section 8.

Reply: All residents of PHA can avail themselves of FSS program. Even though FSS outreach efforts were made availability to non-Section 8 participants, the PHA will strive to establish better lines of communication with all program participants once FSS is re-instituted.

2. Monthly commission meetings should be held at Hartford Terrace rather than at SRO.

Reply: Board meeting are now held on sight at Hartford Terrace.

3. Security services are needed 24 hours if funding permits, or eliminate day shift if there's a funding problem.

Reply: The PHA will seriously consider this suggestion.

4. Glad to hear modernization work at Hartford Terrace finally will begin soon.

Reply: Modernization work

Reply: Future parking for HT will address these concerns.

....Happy rent formulas are in effect at HT, some move outs were due to rents being too high.

Reply: Rent formulas were reviewed with client. Agreed with comment.

Resident Council is a mess and has not worked for a while.
Would like people elected to serve based on "good of the order".

Reply: PHA is working with Board, City of Muskegon and TARC to develop a Resident Council which will operate per HUD's guidelines.

PHA must also better educate residents on function of council.

spectfully submitted by:


Anne Morrissey
Assistant Housing Director

MUSKEGON HOUSING COMMISSION ORGANIZATIONAL CHART

BOARD OF COMMISSIONERS (appointed by the City)

Edward Horne, Chairman

Mary Jo McCann, Vice-Chairman

Gregory Kirksey

Maxine Lenear

Vacant

EXECUTIVE DIRECTOR

Kirby D. Smith

ASSISTANT DIRECTOR

Yvonne Morrissey

18 MANAGER

J. Jones

DEPT. SECRETARY

Deborah Crockett

CLERK

Selma Davis

CLERK

Carmeia Wiseman

MAINTENANCE

SUPERVISOR

Bob Wilcox

MAINT. WORKER (2)

Mark Kass

Sam Ollie

RESIDENT ADVISORY BOARD

Hartford Terrace/Public Housing:

Member: Beth Lathers
1080 Terrace, Apt. 1009
Muskegon MI 49442

Alternate:

Section 8:

Member: Debra De Mille
834 S. Sheridan
F104
Muskegon MI 49442

Alternate: Lula Jones
605 Oak
Muskegon MI 49442

Eloise Six
3020 Peck
Apt. 218
Muskegon Heights MI 49444

Homeownership:

Member: Saquetta Chatman
492 Erickson
Muskegon MI 49442

Alternate:

Capital Fund Program Five-Year Action Plan Part II: Supporting Pages—Work Activities

[illegible]

Part II: Supporting Pages—Work Activities

Activities for Year: 4

FFY Grant: 2004
PHA FY: 2005

Activities for Year: 5

FFY Grant:	2005
PHA FY:	2006

Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
04 Hartford Terrace	car port (30 units)	\$ 30,000	04. Hartford Terrace	carport (30 units)	\$ 33,000
	Replace kitchen			Replace kitchen	
	concrete pads (30 units)	85,000		concrete pads (30 units)	91,000
	8 side doors	65,000		Refrigerators	65,000
	side walk 12-14 unit	7,000		Elevator/laser stop	35,000
	contingency	20,000		A + E	22,000
	A + E	23,000			
HA - wide	computer up grade	20,000			
Total CFP Estimated Cost	\$ 250,000				\$ 250,000

MEMORANDUM OF AGREEMENT

WHEREAS:

Both the Muskegon Housing Commission, hereinafter referred to as MHC, and the Secretary of the United States Department of Housing and Urban Development acting by and through the Director of the Cleveland Troubled Agency Recovery Center, hereinafter referred to as the TARC, are interested in and committed to continued improvement of the operation of MHC, and,

WHEREAS:

Both MHC and the TARC wish to formalize their joint effort to continue improvement efforts currently underway at MHC;

BE IT RESOLVED:

That MHC and the TARC do hereby agree to enter into and jointly implement the Memorandum of Agreement (MOA) that is attached.

BE IT FURTHER RESOLVED

That both parties to this agreement agree to make sustained, good faith efforts to meet the performance targets the MOA contains.

This agreement is made as of the _____ day of _____, 2001 by and between the above parties.

FOR:
MUSKEGON HOUSING
COMMISSION

FOR:
TROUBLED AGENCY RECOVERY CENTER

Maxine Lenear
Maxine Lenear, Chair
Board of Commissioners
Date 12-18-01

Michael A. Williams
Director
Date _____

Lucas D. Smith

Lucas D. Smith
Executive Director
Date: 12/20/10

Patricia A. Knight
Acting Deputy Director
Date: _____

MUSKOGEE, INC.

OCTOBER 2011 - NOVEMBER 2011

Assistance Award/Amendment

U.S. Department of Housing
And Urban Development
Office of Administration

⁶⁰⁰¹
AUG 27 2001

TARC

1. Assistance Instrument <input checked="" type="checkbox"/> Cooperative Agreement <input type="checkbox"/> Grant		2. Type of Action <input checked="" type="checkbox"/> Award <input type="checkbox"/> Amendment	
3. Instrument Number CA-PB1-01-01	4. Amendment Number 2	5. Effective Date of this Action	6. Control Number CA-PB1-01-01
7. Name and Address of Recipient MUSKEGON HOUSING COMMISSION 1080 TERRACE STREET MUSKEGON MI 49441 TIN: 38-3023633		8. HUD Administering Office CLEVELAND TARC OFFICE 1350 EUCLID AVE RM 900 CLEVELAND OH 44115-1815	
10. Recipient Project Manager KIRBY D. SMITH		9. HUD Government Technical Representative JOSEPH F. GAGYI	
11. Assistance Arrangement <input checked="" type="checkbox"/> Cost Reimbursement <input type="checkbox"/> Cost Sharing <input type="checkbox"/> Fixed Price	12. Payment Method <input type="checkbox"/> Treasury Check Reimbursement <input type="checkbox"/> Advance Check <input checked="" type="checkbox"/> Automated Clearinghouse	13. HUD Payment Office LOCCS/VRS	
14. Assistance Amount Previous HUD Amount \$ 0 HUD Amount this action \$ 125,000.00 Total HUD Amount \$ 125,000.00 Recipient Amount \$ 0 Total Instrument Amount \$ 125,000.00		15. HUD Accounting and Appropriation Data 15a. Appropriation Number 15b. Reservation Number Amount Previously Obligated \$ 0 Obligation by this action \$ 125,000.00 Total Obligation \$ 125,000.00	

The purpose of this cooperative agreement is to provide the Muskegon Housing Commission with funding necessary to enable the Commission to recover from troubled status.

17. <input checked="" type="checkbox"/> Recipient is required to sign and return three (3) copies of this document to the HUD Administering Office		18. <input type="checkbox"/> Recipient is not required to sign this document.	
19. Recipient (By Name) Kirby D. Smith Signature & Title <i>Kirby D Smith</i> Executive Director		20. HUD (By Name) <i>Michael A. Williams</i> Signature & Title Director, Cleveland TARC	
Date 08-16-01		Date 9/6/01	

Previous editions are obsolete

Form HUD-1044 (8/90)

Rating Budget

U.S. Department of Housing and Urban Development Office of Public and Indian Housing

Owned Rental Housing

OMB Approval No. 2577-0026 (exp. 10/31/97)

Reporting burden for this collection of information is estimated to average 116 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any aspect of this collection of information, including suggestions for reducing this burden, to the Reports Management Officer, Office of Information Policies and Systems, Department of Housing and Urban Development, Washington, D.C. 20410-3600 and to the Office of Management and Budget, Paperwork Reduction Project (0026), Washington D.C. 20503. Do not send this completed form to either of the above addressees.

a. Date of Submission Original <input type="checkbox"/> Revision No. _____		b. Fiscal Year Ending 09/30/2002	c. No. of months (check one) <input checked="" type="checkbox"/> 12 mo. <input type="checkbox"/> Other (specify) _____		d. Type of HUD assisted Projects 01 <input checked="" type="checkbox"/> PHA/PIA-Owned Rental Housing 02 <input type="checkbox"/> IHA Owned Mutual Help Homeownership 03 <input type="checkbox"/> PHA/PIA Leased Rental Housing 04 <input type="checkbox"/> PHA/PIA Owned Turnkey III Homeownership 05 <input type="checkbox"/> PHA/PIA Leased Homeownership			
e. Name of Public Housing Agency / Indian Housing Authority (PHA/PIA) JSKEGON HOUSING COMMISSION								
f. Address (City, State, zip code) 80 TERRACE JSKEGON, MI 49442								
g. C Number 3013		h. PAS/LOCCS Project No. MI06600402S			i. HUD Field Office DETROIT			
j. No. of Dwelling Units 188	k. No. of Unit Months Available 2256	l. No. of Projects 5						
Acct. No.	Description (1)	Actuals Last Fiscal Yr. 09/30/2000 PUM (2)	Estimates or Actual Current Budget Yr. 09/30/2001 PUM (3)	Requested Budget Estimates				
				PHA/PIA Estimates		HUD Modifications		
				PUM (4)	Amount (to nearest \$10) (5)	PUM (6)	Amount (to nearest \$10) (7)	
Homebuyers Monthly Payments for:								
7710	Operating Expense							
7712	Earned Home Payments							
7714	Nonroutine Maintenance Reserve							
Total Break-Even Amount (sum of lines 010, 020, and 030)								
7716	Excess (or deficit) in Break-Even							
7790	Homebuyers Monthly Payments - Contra							
Renting Receipts								
3110	Dwelling Rental	136.13	130.36	190.64	430,080			
3120	Excess Utilities	0.38	0.57	0.44	1,000			
3190	Nondwelling Rental		5.27	4.88	11,000			
Total Rental Income (sum of lines 070, 080, and 090)		136.51	136.20	195.96	442,080			
3610	Interest on General Fund Investments	1.66		8.87	20,000			
3690	Other Income	51.25	88.79	57.97	130,790			
Total Operating Income (sum of lines 100, 110, and 120)		189.42	224.99	262.80	592,870			
Renting Expenditures - Administration:								
4110	Administrative Salaries	25.10	34.41	63.60	143,480			
4130	Legal Expense	15.62	11.97	11.30	25,500			
4140	Staff Training	0.29		1.88	4,250			
4150	Travel	1.81	0.72	3.01	6,800			
4170	Accounting Fees	3.40	4.02	4.52	10,200			
4171	Auditing Fees		1.80	2.64	5,950			
4190	Other Administrative Expenses	8.85	7.35	10.17	22,950			
Total Administrative Expense (sum of line 140 thru line 200)		55.07	60.27	97.13	219,130			
Tenant Services:								
4210	Salaries							
4220	Recreation, Publications and Other Services	0.18	0.24	0.44	1,000			
4230	Contract Costs, Training and Other	1.12						
Total Tenant Services Expense (sum of lines 220, 230, and 240)		1.30	0.24	0.44	1,000			
Utilities:								
4310	Water	7.06	10.59	11.08	25,000			
4320	Electricity	38.85	60.43	56.74	128,000			
4330	Gas	15.85	20.48	19.95	45,000			
4340	Fuel							
4350	Labor							
4390	Other utilities expense							
Total Utilities Expense (sum of line 260 thru line 310)		61.76	91.50	87.77	198,000			

Name of PHA/IHA USKEGON HOUSING COMMISSION				Fiscal Year Ending 09/30/2002				
Line No.	Acct. No.	Description (1)	Actuals Last Fiscal Yr. 09/30/00 PUM (2)	<input checked="" type="checkbox"/> Estimates <input type="checkbox"/> or Actual Current Budget Yr. 09/30/01 PUM (3)	Requested Budget Estimates			
					PHA/IHA Estimates		HUD Modifications	
					PUM (4)	Amount (to nearest \$10) (5)	PUM (6)	Amount (to nearest \$10) (7)
Ordinary Maintenance and Operation:								
130	4410	Labor	28.62	30.10	41.13	92,800		
140	4420	Materials	16.23	17.24	17.73	40,000		
150	4430	Contract Costs	23.30	37.91	26.60	60,000		
160		Total Ordinary Maintenance and Operation Expense (line 330 to 350)	68.15	85.25	85.46	192,800		
Protective Services:								
170	4460	Labor						
180	4470	Materials						
190	4480	Contract Costs						
100		Total Protective Services Expense (sum of lines 370 to 390)						
General Expense:								
110	4510	Insurance	5.10	9.08	13.90	31,360		
120	4520	Payments in Lieu of Taxes	6.31	4.47	10.82	24,410		
130	4530	Terminal Leave Payments						
140	4540	Employee Benefit Contributions	50.58	27.94	35.09	79,170		
150	4570	Collection Losses	5.44	6.52	5.76	13,000		
160	4590	Other General Expense	4.60					
170		Total General Expense (sum of lines 410 to 460)	72.03	48.01	65.58	147,940		
180		Total Routine Expense (sum of lines 210, 250, 320, 360, 400, and 470)	258.31	285.27	336.38	758,870		
Rent for Leased Dwellings:								
190	4710	Rents to Owners of Leased Dwellings						
500		Total Operating Expense (sum of lines 480 and 490)	258.31	285.27	336.38	758,870		
Nonroutine Expenditures:								
510	4610	Extraordinary Maintenance	3.19					
520	7520	Replacement of Nonexpendable Equipment	10.79		2.22	5,000		
530	7540	Property Betterments and Additions	0.73					
540		Total Nonroutine Expenditures (sum of lines 510, 520, and 530)	14.71		2.22	5,000		
550		Total Operating Expenditures (sum of lines 500 and 540)	273.02	285.27	338.59	763,870		
Prior Year Adjustments:								
560	6010	Prior Year Adjustments Affecting Residual Receipts						
Other Expenditures:								
570		Deficiency in Residual Receipts at End of Preceding Fiscal Yr.						
580		Total Operating Expenditures, including prior year adjustments and other expenditures (line 550 plus or minus line 560 plus line 570)	273.02	285.27	338.59	763,870		
590		Residual Receipts (or Deficit) before HUD Contributions and provision for operating reserve (line 130 minus line 580)	(83.60)	(60.28)	(75.80)	(171,000)		
HUD Contributions:								
600	8010	Basic Annual Contribution Earned-Leased Projects:Current Year						
610	8011	Prior Year Adjustments - (Debit) Credit						
620		Total Basic Annual Contribution (line 600 plus or minus line 610)						
630	8020	Contributions Earned - Op.Sub.-Cur.Yr.(before year-end adj)	59.32	120.76	102.21	230,596	153.49	340,280
640		Mandatory PFS Adjustments (net)						
650		Other (specify):						
660		Other (specify):						
670		Total Year-end Adjustments/Other (plus or minus lines 640 thru 660)						
680	8020	Total Operating Subsidy-current year (line 630 plus or minus line 670)	59.32	120.76	102.21	230,596	153.49	340,280
690		Total HUD Contributions (sum of lines 620 and 680)	59.32	120.76	102.21	230,596	153.49	340,280
700		Residual Receipts (or Deficit) (sum of line 590 plus line 690)	(24.28)	60.48	26.42	59,596	77.70	175,280
Enter here and on line 810								

Name of PHA/IHA MUSKEGON HOUSING COMMISSION		Fiscal Year Ending 09/30/2002	
Operating Reserve		PHA/IHA Estimates	HUD Modifications
Part I - Maximum Operating Reserve - End of Current Budget Year			
740	2821 PHA/IHA-Leased Housing - Section 23 or 10(c) 50% of Line 480, column 5, form HUD-52564		

Part II - Provision for and Estimated or Actual Operating Reserve at Fiscal Year End			
780	Operating Reserve at End of Previous Fiscal Year - Actual for FYE (date): 09/30/2000	542,882	526,189
790	Provision for Operating Reserve - Current Budget Year (check one) <input checked="" type="checkbox"/> Estimated for FYE <input type="checkbox"/> Actual for FYE 09/30/2001	126,318	
800	Operating Reserve at End of Current Budget Year (check one) <input checked="" type="checkbox"/> Estimated for FYE <input type="checkbox"/> Actual for FYE 09/30/2001	669,200	652,503
810	Provision for Operating Reserve - Requested Budget Year Estimated for FYE Enter Amount from line 700 09/30/2002	59,596	175,280
820	Operating Reserve at End of Requested Budget Year Estimated for FYE (Sum of lines 800 and 810) 09/30/2002	728,796	827,787*
830	Cash Reserve Requirement- _____ of line 480		

Comments:

* These figures cannot be verified until GAP conclusion is complete. This HAS NOT been approved as of this Budget Approval.

PHA/IHA Approval	Name	KIRBY SMITH	
	Title	EXECUTIVE DIRECTOR	
	Signature	<i>Kirby Smith</i>	Date 7-18-01
Field Office Approval	Name	Patricia A. Knight	
	Title	Acting Deputy Director	
	Signature	<i>Patricia A. Knight</i>	Date 12/14/01

Schedule of All Positions and Salaries

U.S. Department of Housing
and Urban Development
Office of Public and Indian Housing

Name of Housing Authority

MUSKEGON HOUSING COMMISSION

Locality

MUSKEGON, MI 49442

OMB Approval No. 2577-0026 (Exp. 10/31/97)
Fiscal Year End
09/30/2002

Position Title and Name By Organizational Unit and Function	(1)	(1a)	(2)	(3)	Requested Budget Year		Allocation of Salaries by Program						Method of Allocation	
					Salary Rate	No. Months	Amount	LOW RENT	SECTION 8	TURNKEY III H/O	CAPITAL GRANT	Section 8 Programs		Other Programs
EXECUTIVE DIRECTOR		AN-T		54,000.00	12	54,000	45,900	2,700	2,700	2,700			(12)	
ADMINISTRATIVE ASSISTANT		AN-T		18,800.00	12	18,800	15,980	1,880	940					
FINANCE & ADMIN COORDINATOR		AN-T		34,000.00	12	34,000	28,900	2,470	1,700	930				
PH REPRESENTATIVE		AN-T		34,000.00	12	34,000	18,700	13,600	1,700					
SECTION 8 REPRESENTATIVE		AN-T		25,000.00	12	25,000	25,000							
PH SECTION 8 INSPECTOR		AN-T		25,000.00	12	25,000	9,000	25,000						
MAINTENANCE SUPERVISOR		AN-T		15,000.00	12	15,000		6,000						
MAINTENANCE WORKER		M		34,000.00	12	34,000	28,900		1,700	3,400				
MAINTENANCE WORKER		M		22,000.00	12	22,000	20,900		1,100					
CUSTODIAN		M		22,000.00	12	22,000	22,000							
		M		21,000.00	12	21,000	21,000							
TOTALS THIS PAGE						304,800	236,280	51,650	9,840	7,030				

ALL POSITIONS AS IDENTIFIED DO NOT EXCEED 100% OF ANY INDIVIDUAL EMPLOYEES TIME

09/30/2002

At the best of my knowledge, all the information stated herein is true.

To the best of my knowledge, all the information stated herein, as well as any information provided in the accompanying herewith, is true and accurate.
Warning: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012.31 U.S.C. 3729, 3802)
Form HUD-52566 (3/95) ref Handbook 7475.1

Schedule of All Positions and Salaries

U.S. Department of Housing
and Urban Development
Office of Public and Indian Housing

Name of Housing Authority

MUSKEGON HOUSING COMMISSION

Locality

MUSKEGON, MI 49442

OMB Approval No. 2577-0026 (Exp. 10/31/97)

Fiscal Year End

09/30/02

Position Title and Name By Organizational Unit and Function	(1)	(1a)	(2)	Requested Budget Year			Allocation of Salaries by Program					Method of Allocation (12)	
				Salary Rate As of (date)	Estimated Payment		Management	Mutual Help	Leased Homeworking	Turnkey III	Section 8 Programs		Other Programs
					Salary Rate (3)	No. Months (4)							
Total Salaries for all Categories													
Administrative Non-Technical Salaries		AN-T			205,800	143,480	51,650	7,040	3,630				
Administrative Technical Salaries		A-T											
Tenant Services Labor		TS											
Maintenance Labor		M			99,000	92,800		2,800	3,400				
Utilities		U											
Other		O											
Total Payroll					304,800	236,280	51,650	9,840	7,030				
ALL POSITIONS, AS IDENTIFIED, DO NOT EXCEED 100% OF ANY INDIVIDUAL FUND SOURCE.													

09/30/02

ALL POSITIONS AS IDENTIFIED, DO NOT EXCEED 100% OF ANY INDIVIDUAL EMPLOYEE'S TIME

Warning: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

Executive Director or Designated Official

Date 7-18-01

Operating Budget
Schedule of Administration
Expense Other Than Salary

U.S. Department of Housing
and Urban Development
Office of Public and Indian Housing

OMB Approval No. 2577-0026 (Exp. 10/31/97)

The reporting burden for this collection of information is estimated to average 1.0 hour per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or other aspect of this collection of information, including suggestions for reducing this burden, to the Reports Management Officer, Office of Information Policies and Plans, U.S. Department of Housing and Urban Development, Washington, D.C. 20410-3600 and to the Office of Management and Budget, Paperwork Reduction Project (2577-00260), Washington D.C. 20503. Do not send this completed form to either of the above addressees.

Name of Housing Authority:		Locality:				Fiscal Year End:	
SKEGON HOUSING COMMISSION		MUSKEGON, MI 49442				09/30/2002	
(1) Description	(2) Total	(3) Management 85%	(4) Mutual Help	(5) Leased Rental	(6a) Turnkey III 57%	(6b) Section 8 10%	(6c) Other
Legal Expense (see Special Note in Instructions)	30,000	25,500	/		1,500	3,000	
Training (list and provide justification)	5,000	4,250	/		250	500	
Travel - Trips To Conventions and Meetings (list and provide justification)							
Other Travel:							
Outside Area of Jurisdiction	8,000	6,800			400	800	
Within Area of Jurisdiction							
Total Travel	8,000	6,800			400	800	
Accounting	12,000	10,200			600	1,200	
Auditing	7,000	5,950			350	700	
Sundry							
Rental of Office Space							
Publications	500	425			25	50	
Membership Dues and Fees (list organization and amount)	500	425			25	50	
Telephone, Fax, Electronic Communications	15,000	12,750			750	1,500	
Collection Agent Fees and Court Costs	1,000	850			50	100	
Administrative Services contracts (list and provide justification)							
Forms, Stationary and Office Supplies	5,000	4,250			250	500	
Other Sundry Expense (provide breakdown)	5,000	4,250			250	500	
Total Sundry	27,000	22,950			1,350	2,700	
Total Administration Expense Other Than Salaries	89,000	75,650			4,450	8,900	

I, the undersigned, certify that the best of my knowledge, all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate.

Warning: HUD will prosecute false claims and statements.

Conviction may result in criminal and/or civil penalties:

U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802

Signature of authorized representative & Date:

Kirby D Smith 7-18-01

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Page 1 of 2

form HUD-52571 (3/95)
ref Handbook 7475.1

Operating Budget
Summary of Budget Data
and Justifications

U.S. Department of Housing
and Urban Development
Office of Public and Indian Housing

Owned Rental

OMB Approval No. 2577-0026 (Exp. 10/31/97)

Public Reporting Burden for this collection of information is estimated to average 0.75 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Reports Management Officer, Office of Information Policies and Systems, U.S. Department of Housing and Urban Development, Washington, D.C. 20410-3600 and to the Office of Management and Budget, Paperwork Reduction Project (2577-0026) Washington, D.C. 20503. Do not send this completed form to either of the above addressees.

Name of Local Housing Authority:	Locality	Fiscal Year Ending
MUSKEGON HOUSING COMMISSION	MUSKEGON, MI 49442	09/30/2002

Operating Receipts

Dwelling Rental: Explain basis for estimate. For HUD-aided low-rent housing, other than Section 23 Leased housing, state amount of latest available total HA monthly rent roll, the number of dwelling units available for occupancy and the number accepted for the same month end. Cite HA policy revisions and economic and other factors which may result in a greater or lesser average monthly rent roll during the Requested Budget Year. For Section 23 Leased housing, state the number of units under lease, the PUM lease price, and whether or not the cost of utilities is included. If not included, explain method for payment at utility costs by HA and/or tenant.

SEE PFS CALCULATION FOR DETAILS

Total Operating Receipts: 430,084

Excess Utilities: (Not for Section 23 Leased housing.) Check appropriate spaces in item 1, and explain "Other". Under item 2, explain basis for determining excess utility consumption. For example, Gas/individual check meters at OH-100-1, proration of excess over allowances at OH-100-2, etc. Cite effective date of present utility allowances. Explain anticipated changes in allowances or other factors which will cause a significant change in the total amount of excess utility charges during the Requested Budget Year.

1. Utility Services Surcharged: ☐ Gas ☐ Electricity ☐ Other (Specify) _____
2. Comments

ANTICIPATE 1,000.00

Total Excess Utilities: 1,000

Nondwelling Rent:(Not for Section 23 Leased housing.) Complete Item 1, specifying each space rented, to whom, and the rental terms. For example:Community Building Space - Nursery School - \$50 per month, etc. Cite changes anticipated during the Requested Budget Year affecting estimated Non-dwelling Rental income.

1.	Space Rented	To Whom	Rental Terms
	ANTENNA		

2. Comments

ANTENNA @11,000.00

Total Non-Dwelling Rent: 11,000

Interest on General Fund Investments: State the amount of present General Fund Investment and the percentage of the General Fund it represents. Explain circumstances such as increased or decreased operating reserves, dwelling rent, operating expenditures, etc., which will affect estimated average monthly total investments in the Requested Budget Year. Explain basis for distribution of interest income between housing programs.

175,000.00 @ 9.5% (SECOND MORTGAGE ON THE COMMERCE ST. BUILDING) = 16,625.00

OTHER INTEREST ON GENERAL FUND INVESTMENTS = 3,375.00

Total Interest on Investments: 20,000

Other Comments On Estimates of Operating Receipts: Give comments on all other significant sources of income which will present a clear understanding of the HA's prospective Operating Receipts situation during the Requested Budget Year. For Section 23 Leased housing explain basis for estimate of utility charges to tenants.

LAUNDRY COMMISSION 4,500.00
MAINT. CHARGES 500.00
10% OF CAPITAL GRANT 25,785.00
SALE OF 5H HOMES (2 @ 50,000 100,000.00
130,785.00

Total Other Income: 130,785

Operating Expenditures

Summary of Staffing and Salary Data

Complete the summary below on the basis of information shown on form HUD-52566, Schedule of All Positions and Salaries, as follows:

Column (1) Enter the total number of positions designated with the corresponding account line symbol as shown in Column (1), form HUD-52566.

Column (2) Enter the number of equivalent full-time positions allocable to HUD-aided housing in management. For example: A HA has three "A-NT" positions allocable to such housing at the rate of 80%, 70%, and 50 % respectively. Thus, the equivalent full-time positions is two. (8/10 + 7/10 + 5/10).

Column (3) Enter the portion of total salary expense shown in Column (5) or Column (6), form HUD-52566, allocable to HUD-aided housing in management, other than Section 23 Leased housing.

Column (4) Enter the portion of total salary expense shown in Column (5) or Column (10), form HUD-52566, allocable to Section 23 Leased housing in management.

Column (5) Enter the portion of total salary expense shown in Column (5) or Column (7), form HUD-52566, allocable to Modernization programs (Comprehensive Improvement Assistance Program or Comprehensive Grant Program).

Column (6) Enter the portion of total salary expense shown in Column (5) or Column (9), form HUD-52566, allocable to Section 8 Programs.

Note: The number of equivalent full-time positions and the amount of salary expense for all positions designated "M" on form HUD-52566 must be equitably distributed to account lines Ordinary Maintenance and Operation-Labor, Extraordinary Maintenance Work Projects, and Betterments and Additions Work Projects

Account Line	Total Number of Positions (1)	HUD-Aided Management Program				
		Equivalent Full-Time Positions (2)	Salary Expense			
			Management (3)	Section 23 Leased Housing Only (4)	Modernization Programs (5)	Section 8 Program (6)
Administration-Nontechnical Salaries 1	7	7				
Administration-Technical Salaries 1						
Ordinary Maintenance and Operation-Labor 1	4	4				
Utilities-Labor 1						
Other (Specify) (Legal, etc.) 1						
Extraordinary Maintenance Work Projects 2						
Betterments and Additions Work Projects 2						

1 Carry forward to the appropriate line on HUD-52564, the amount of salary expense shown in Column (3) on the corresponding line above. Carry forward to the appropriate line on HUD-52564 (Section 23 Leased Housing Budget), the amount of salary expense shown in Column (4) on the corresponding line above.

2 The amount of salary expense distributed to Extraordinary Maintenance Work Projects and to Betterments and Additions Work Projects is to be included in the cost of each individual project to be performed by the HA Staff, as shown on form HUD-52567.

Specify all proposed new positions and all present positions to be abolished in the Requested Budget Year. Cite prior HUD concurrence in proposed staffing changes or present justification for such changes. Cite prior HUD concurrence in proposed salary increases for Administration Staff or give justification and pertinent comparability information. Cite effective date for current approved wage rates (form HUD-52158) and justify all deviations from these rates.

Travel, Publications, Membership Dues, and Fees, Telephone and Telegraph, and Sundry: In addition to "Justification for Travel to Conventions and Meetings" shown on Form HUD-52571, give an explanation of substantial Requested Budget Year estimated increases over the PUM rate of expenditures for these accounts in the Current Budget Year. Explain basis for allocation of each element of these expenses.

SEE HUD 52571 FOR DETAIL

Utilities: Give an explanation of substantial Requested Budget Year estimated increases over the PUM rate of expenditures for each utility service in the Current Budget Year. Describe and state estimated cost of each element of "Other Utilities Expense."

SEE HUD 52722A FOR DETAILS

Total Water	25,000.00
Total Electricity	128,000.00
Total Gas	45,000.00
Total Fuel	
Total Other	
Total Utilities:	198,000

Ordinary Maintenance & Operation-Materials: Give an explanation of substantial Requested Budget Year estimated increases over the PUM rate of expenditures for materials in the Current Budget Year.

ESTIMATE MAINTENANCE MATERIALS FOR YEAR AT \$40,000.00

Total Maintenance Materials: 40,000

Ordinary Maintenance & Operation-Contract Costs: List each ordinary maintenance and operation service contracted for and give the estimated cost for each. Cite and justify new contract services proposed for the Requested Budget Year. Explain substantial Requested Budget Year increases over the PUM rate of expenditure for Contract Services in the Current Budget Year. If LHA has contract for maintenance of elevator cabs, give contract cost per cab.

ELEVATOR MAINTENANCE	9,000.00	ALARM MONITORING	2,750.00
EXTERMINATION	3,600.00	CONTRACT REPAIRS	25,450.00
GARBAGE	5,200.00		
VEHICLE REPAIR	3,500.00		
SNOW REMOVAL	6,500.00		
HARDWARE MAINTENANCE	1,500.00		
SOFTWARE MAINTENANCE	2,500.00		

Total Maint. Contract Costs: 60,000

Insurance: Give an explanation of substantial Requested Budget Year estimated increases in the PUM rate of expenditures for insurance over the Current Budget Year. Cite changes in coverage, premium rates, etc.

COMMERCIAL PROPERTY	16,704.00	TOTAL 40,200.00 X 78% = 31,356.00
DISHONESTY	518.00	
AUTO COVERAGE	2,426.00	
CAPITAL CONTRIBUTION	100.00	
GENERAL LIABILITY	13,324.00	
LAW ENFORCEMENT	2,536.00	
WORKERS COMP	4,592.00	

Total Insurance: 31,356

Employee Benefit Contributions: List all Employee Benefit plans participated in. Give justification for all plans to be instituted in the Requested Budget Year for which prior HUD concurrence has not been given.

		LOW RENT	SECTION 8	TURNKEY	CAPITAL GRANT
SOCIAL SECURITY	23,317.00				
BLUE CROSS/BLUE SHIELD	46,788.00				
LIFE, DISABILITY INSURANCES	2,088.00				
EXECUTIVE DIRECTOR INS.	14,064.00				
PENSION	15,240.00				
TOTAL	101,497.00	79,167.66	17,254.49	3,044.91	2,029.94

Total Employee Benefits: 79,167

Collection Losses: State the number of tenants accounts receivable to be written off and the number and total amount of all accounts receivable for both present and vacated tenants as of the month in which the estimate was computed.

COLLECTION LOSSES ARE ESTIMATED TO BE \$13,000.00

Total Collection Losses: 13,000

Extraordinary Maintenance, Replacement of Equipment, and Betterments and Additions: Cite prior HUD approval or give justification for each nonroutine work project included in the Requested Budget and for those for future years which make up the estimate on form HUD-52570. Justifying information incorporated on or attached to form HUD-52567 need not be repeated here.

Contracts: List all contracts, other than those listed on page 3 of this form under Ordinary Maintenance & Operation (OMO). Cite the name of the contractor, type of contract, cost of contract, and contract period. Justification must be provided for all contract services proposed for the Requested Budget Year (RBY). Explain substantial RBY increases over the PUM rate of expenditure for these contracts in the Current Budget Year.

Operating Budget Schedule of Nonroutine Expenditures

U.S. Department of Housing
and Urban Development
Office of Public and Indian Housing

OMB Approval No. 2577-0026 (Exp. 10/31/97)

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MUSKEGON HOUSING COMMISSION

Locality
MUSKEGON, MI 49442

Fiscal Year Ending

09/30/2002

Extraordinary Maintenance and Betterments and Additions (Excluding Equipment Additions)										Equipment Requirements			
Work Project Number (1)	Description of Work Project (List Extraordinary Maintenance and Betterments and Additions separately) (2)	Housing Project Number (3)	Total Estimated Cost (4)	Percent Complete Current Budget Year End (5)	Requested Budget Year		Description of Equipment Items (List Replacements and Additions separately) (8)	Requested Budget					
					Estimated Expenditure in Year (6)	Percent Complete Year End (7)		No of Items (9)	Item Cost (10)	Estimated Expenditure in Year (11)			
RE							RANGES		5	360	1,800		
RE							REFRIGERATORS		4	800	3,200		
TOTALS THIS PAGE													

Warning: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012.3; U.S.C. 3729.3802)

Form HUD-52567 (3/95)
Page 1 of 2

ref Handbook 7475.1